PLANNING AND POLICY STUDY FOR INDUSTRIAL PARKS IN NEW BRUNSWICK

FINAL REPORT

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Prepared for:

The Department of Commerce and Technology

December 18, 1990

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Re: Planning and Policy Study for Industrial Parks in New Brunswick

Dear John:

Attached please find twelve copies of the Final Report for the above-mentioned study.

As decided in conjunction with the Steering Committee Members, we are providing the Executive Summary under separate cover. The report has been revised and edited to reflect valuable input received at the recent Steering Committee meeting.

It has been a pleasure working with you and the other Steering Committee Members on this important and challenging project.

Yours truly,

Ellis Jagoe
Senior Research Economist

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Encl.

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1.0 INTRODUCTION

1.1 Background

Over the last 20 years, industrial parks been have perceived by many as the key infrastructure tool to encourage rational economic development. At present, there are 51 industrial parks operating in the Province of New Brunswick. For many years, the Department of Commerce and Technology (and its predecessor agencies) has been heavily involved in the administration and funding of infrastructure projects either under its own provincial budget or under a Federal/Provincial cost-sharing program.

Infrastructure support provided by Commerce and Technology generally involves funding for improvements to water supplies, sewage handling and treatment, and transportation accessibility. The Department has contributed support over the years to establish many of these industrial parks. Currently, the Department itself owns and operates ten parks, municipalities own and operate 28 and Regional Economic Development Commissions own and operate 12, while CN operates its own park in Moncton.

It is estimated that these 51 parks combine to house over 600 companies employing approximately 13,000 persons. They have a broad mix of industrial and commercial tenants ranging in size from one or two person firms to plants employing several hundred people.

Industrial parks in this province are facing serious problems, most of which are centred around infrastructure systems that are inadequate to meet the needs of some existing or potential clients. Inadequate infrastructure severely restricts the ability of the parks to attract new industry which can result in economic growth.

These serious problems require immediate and on-going funding. The following brief inventory of problems demonstrates the obstacles to park expansion and industrial development.

- Some parks have no land left for sale to meet industrial needs.
- No park presently has the capacity to meet industrial waste treatment needs.
- Some parks currently have no water supply system at all, and other parks do not have a major viable water supply source.
- The services at many parks are now 20 years old and require upgrading to meet the needs of todays industries.

Although the Department has invested heavily in industrial parks, it has never studied the economic impact of these parks nor has it examined the lessons which could be learned from its long time endeavors in this field. Because of the number of parks and their on-going problems, the limited human and financial resources of the Department have been devoted to addressing the day to day concerns with little time or funding being devoted to development of a plan for infrastructure funding. The Department feels that such a plan is warranted to provide guidance for future policies and expenditures regarding industrial infrastructure.

1.2 Purpose of Study

The purpose of this study is to formulate a policy for the Department of Commerce and Technology relating to the support of industrial parks which would result in development which maximizes economic benefits on a regional basis and for the Province as a whole.

The study is to review land use policy in the Province of New Brunswick as it pertains to industrial parks and infrastructure policy development. The report provides a policy framework within which industrial park planning, infrastructure development, and management of on-going operations can be determined in a coherent manner. It addresses the issues of appropriate fee structure for sale of park land as well as a rationalization strategy to deal with existing as well as future parks. Consideration is given to the nature and scope of participation by economic commissions, municipalities and local service districts in the development and on-going operation of industrial parks.

1.3 Study Process

The study involved three major phases:

1. Data Collection and Research
2. Data Analysis and Findings
3. Development of Policy Recommendations

The data collection and research phase involved a review of government policies, previous reports and past files dealing with industrial park development and provincial government involvement in infrastructure development for industrial parks.

Prior to project initiation, Commerce and Technology (C & T) staff had prepared and distributed a letter soliciting information from each of the parks concerning the status of infrastructure, types of business tenants, employment, tenant property tax codes, and related pertinent facts. At the time of project commencement, only five responses had been received. Therefore the initial task was to determine what types of additional information was necessary, and how to obtain a satisfactory response from the parks.

A questionnaire was developed in order to obtain up-to-date statistical information on the industrial parks which complemented the information requested by C & T and also to obtain opinions on various issues related to industrial park development and operation. A letter was sent out with the questionnaire, under the Minister's signature, which reminded park officials of the previous information request and asked them to forward the requested data as soon as possible. In order to ensure a satisfactory response rate, numerous telephone calls were made, as necessary, to encourage the completion and return of the questionnaires. These questionnaires were supplemented with follow-up interviews, personal visits or telephone calls with representatives of Commerce and Technology, regional economic development commissions and municipalities which own or operate industrial parks.

The information collected through this process has formed the information base that was utilized to help develop the policy recommendations in Chapter 7.0 of this study.

For a review of the responses to the questionnaire received by FGA from August to mid October, 1990 see **Appendix A**. A sample of the questionnaire can be found in **Appendix B**. As well, a brief profile has been prepared by the Study Team for each of the parks from which information was received. (See **Appendix C**). **Appendix D** provides an overview of the data collection process. This overview indicates which parks responded to the questionnaires as well as those that were interviewed and those that were visited. A complete listing of the persons contacted during the study process can be found in **Appendix E**.

As part of the data collection phase, successful industrial parks outside the Province - several parks in Nova Scotia and in Bangor, Maine were visited to determine why those parks have been successful and if any development strategies or techniques could be transferred to industrial park development in New Brunswick. Interviews were also conducted with representatives of industrial development groups in other provinces to determine any similar trends or strategies which might be applied.

Phase 2 involved the analysis of data. The information collected through background research, interviews and questionnaires was analyzed and grouped under various headings representing issues to be addressed in the formulation of policies and recommendations during phase 3.

1.4 Report Contents

This report contains seven chapters. Chapter 1.0 provides information on the background of industrial parks as well as the purpose and the process of the study.

Chapter 2.0 discusses the rationale for industrial parks in terms of their role as tools for planning, economic development and environmental control. These broad roles are considered first in general terms and then from the New Brunswick perspective.

Chapter 3.0 examines the future infrastructure requirements of parks including land, water, sewer system, sewage treatment, roads, and electrical services. Land development is also discussed with an examination of development outside of parks and the merits of concentrated versus dispersed development.

Chapter 4.0 begins with a discussion on land sales and utilization of the revenues received from land sales. Park promotion and performance issues are considered. Socio-economic benefits derived from industrial parks are also discussed and a detailed review of the benefits and costs associated with the Bathurst and Moncton Industrial parks is provided.

Chapter 5.0 examines park experience in other areas including Nova Scotia, specifically Burnside Industrial Park, and Bangor area parks. An overall review of the management, development and operation of these parks is included.

Chapter 6.0 reviews the positive and negative aspects of park ownership and administration, and presents a brief summary of the ten parks owned by the Province. The appropriate government roles in park development and administration, based on FGA survey responses and personal interviews, are also discussed.

Chapter 7.0 presents the policy recommendations formed by the Study Team using information gathered during the study process.

2.0 RATIONALE FOR INDUSTRIAL PARKS

2.1 Definition of Industrial Parks

The Industrial Development Association of Canada (IDAC), along with other similar organizations such as the Urban Land Institute (ULI) in the United States, has adopted a widely accepted definition for "industrial park" which originally was produced during the 1958 Dartmouth Conference on Industrial Parks.[1]

It defined "Industrial Park" as follows:

An INDUSTRIAL PARK is a planned or organized industrial district with a comprehensive plan which is designed to ensure compatibility between the industrial operations therein and the existing activities and character of the community in which the park is located. The plan must provide for streets designed to facilitate truck and other traffic, proper set-backs, lot size minimums, land use ratio minimums, architectural provisions, landscaping requirements, and specific use requirements, all for the purpose of promoting the degrees of openness and park-like character which are appropriate to harmonious integration into the neighbourhood.

The industrial park must be of sufficient size and suitably zoned to protect the area surrounding it from being devoted to lower uses.[2] The management is charged with the continuing responsibility of preserving compatibility between the park and the community as well as protecting the investments of the developer and tenants.

In discussing the philosophy of Industrial Parks, IDAC goes on to point out that the development of new industrial and business communities in a planned setting has responded effectively to a variety of needs of modern industry. The creation of an attractive working environment has greater social acceptability both to the community in which it is located and to the employees themselves. There is also a great economy in concentrating services to an industrial area and this economy of service is maintained in the concept of an industrial park. **The total effect however, is to integrate economy and function with pleasing aesthetics and controlled environment to the long-term benefit of both industry and the community.**

Although this definition and philosophy has applied to industrial development in North America over the past 30 years, the basic concept and intent expressed is generally accepted today. In fact, its emphasis on efficient and economic development through concentration of services while

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[1] Introduction-Industrial Park Philosophy, Industrial Development Association of Canada, (IDAC).

[2] A minimum size of 30 acres of developable property is suggested.

at the same time emphasizing compatibility with the character and environment of the community, reinforces the concept of "sustainable development" that is currently espoused by most economic, environmental and planning groups and associations.

2.2 Industrial Parks as Planning, Economic and Environmental Tools

In keeping with the concept of "sustainable development", it is generally recognized that industrial parks can be tools that can be used to fulfil planning, economic and environmental objectives. These objectives are by no means mutually exclusive. In fact, the American Society of Civil Engineers states that **"The objective of industrial land planning is to provide suitable space and facilities for industry and to integrate industry into the community in such a manner that it will thrive and result in an economic advantage to the community with a minimum of adverse effects."**

2.2.1 As a Planning Tool

It is widely accepted by professional planners that industrial parks are one of the planning tools used to ensure that development of a community is carried out in an orderly, efficient and equitable manner. This is usually assured through a comprehensive planning exercise which results in the identification of sites for industrial development which meet location criteria related to accessibility, servicing, utilities, topography, drainage and soil conditions as well as compatibility with adjacent development in the community. The process also involves spatial criteria which assures sufficient space is allocated for development and expansion of various types of industrial uses.

The industrial park is a means of assuring that similar uses can be aggregated in a particular area to the mutual benefit of the industries and the community. To the industries it generally assures them of a physically suitable site (i.e. with the necessary access, services, utilities, space, etc.). Industries often have special needs, such as sophisticated sewage treatment systems or high volumes of water. These demands can often be best met in an industrial park.

Benefits can be derived from concentrating industry in a single location. Services and transportation facilities can be rationalized to accommodate the special needs that industries may require while also assuring compatibility with adjacent residential uses and other environmental features.

The location of industry is thus achieved through development of a comprehensive plan that is based on suitable location and space criteria for industry. This plan is accompanied by a zoning regulation which controls the types of uses permitted as well as minimum standards to apply within the industrial area. As pointed out in the general definition, these standards usually relate to access, lot sizes, setbacks, parking, loading, signage and landscaping requirements. These

standards, which may be imposed by the municipality through regular zoning regulations or by park owners through restrictive covenants, assure a higher quality environment which is more pleasing for park employees as well as more acceptable to adjacent residents and the general public.

These comprehensive plans can apply at either the community level or on a larger regional or area basis. At the regional level, in order for industrial areas to be readily marketed and economically developed, the location requirements for industrial parks have to be expanded to consider such factors as:

- the relation to labour supply and consumer markets;
- regional transportation networks including highway as well as rail, air and water modes;
- the availability of adequate water supply and major utilities; and
- the presence of other major facilities and features which pose opportunities or constraints for industrial development.

2.2.2 As An Economic Tool

It is generally recognized that communities or regions that have properly planned and located industrial parks are more likely to attract industrial development and thus industrial parks are regarded as prime tools with which to encourage economic growth in an area.

In a recent industrial study by Marshall Macklin Monaghan Limited[3] it was stated that **"experience elsewhere indicates that an industrial park is still the major tool used for industrial expansion and economic stability. A lack of immediately available industrial land is seen as a real hindrance to economic development".**

This position was reinforced in another recent study conducted by Price-Waterhouse[4] which, in describing industrial parks, commented that **"Their presence is a positive step towards economic growth because it provides suitable and quality physical environments for businesses to locate and expand."**

Industry generates economic benefits for the province, the region and the municipality. Both the province and municipality benefit from the employment and tax revenues generated by industry. The higher tax revenues generated by industry help both levels of government finance social and

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[3] Campbellton Area Industrial Lands Study, Needs Assessment; Marshall Macklin Monaghan Limited, June, 1988.

[4] New Brunswick Regional Economic Development Commissions, An Evaluation and Recommendations for Future Regional Development Efforts; Price Waterhouse, 1988.

community services and programs that could not be supported through residential tax revenues alone. The employment generated by industry, especially if it results from new industry that comes in from outside the community or if it produces goods that are exported outside the community, brings new wealth which will increase the purchasing power of the community. As industrial development grows, so does the economy of the area resulting in new jobs, more tax revenues and the need for additional spinoff services.

Thus industry in general creates economic opportunity in the area in which it is located. The potential for spinoff to other industrial or business opportunities can occur through the supplying of raw materials or services to existing industry (backward linkage), through further processing or manufacturing of products (forward linkage), or through direct purchase of the product (final demand linkage).

The opportunity for these potential linkages to occur (multiplier effects) is enhanced by the provision of an industrial park which permits location of these industries close to each other. The benefits of conglomeration provided by the industrial park may thus result in additional economic growth and development. The concentration of industry in one area also gives a greater impression of success and tends to build up confidence in prospective investors.

The community also benefits from the economies of scale that can be realized with respect to the provision of infrastructure and services in a concentrated industrial park as opposed to development which is spread throughout the community or area. Industrial parks are clearly a tool to facilitate rational and sustainable economic development. The parks provide an incentive for business to locate where sufficient water supply and suitable sewage treatment are available and where noise, odour and traffic concerns can be handled in a more cost-effective and environmentally sensitive manner.

2.2.3 As An Environmental Tool

Industrial development has been one of the major causes of environmental pollution. One of the best means to minimize the impacts associated with industrial development is to concentrate that development in specific locations which are chosen on the basis of environmental considerations and where all development comes under regulations designed to minimize environmental impacts. Municipal, regional or area plans are the mechanisms through which industrial park location can be controlled. These plans should be based on location and space criteria which includes environmental considerations. The impacts associated with the industry (discharge of effluents, wastes, noise etc. into the air, water or soil) can be controlled through zoning or enforcement of performance standards.

The concentration of industry in parks also enables the provision of central water supply and sewage collection and treatment systems which are much more effective in minimizing pollution

than having industries spread throughout the community or region. The latter option is ultimately more costly to the environment through less efficient planning, wasteful use of water and land resources and greater risk to surface and groundwater supplies. The investment in infrastructure is thus considered a form of environmental cost avoidance. The provision of such facilities initially is always less costly than the alternative of providing such facilities later when environmental problems occur. As mentioned earlier, industrial parks are one of the tools that can be used to encourage sustainable development. Sustainable development is based on the concept of "Stewardship". The aim of sustainable development is to encourage economic development which is respectful of our resources and environment so that the present generation can receive the benefits associated with economic development without depleting our resources and further damaging the environment that is left for future generations.

2.3 The New Brunswick Context

2.3.1 Historical Perspective

New Brunswick, along with other areas of Atlantic Canada, has been the recipient of numerous economic development programs aimed at reducing regional disparities. Such programs and development efforts include the Atlantic Development Board (ADB), who administered the Atlantic Development Fund in the early 1960's, Agriculture and Rural Development Act (ARDA), Fund for Rural Economic Development (FRED), Regional Development Incentives Act (RDIA), Department of Regional Economic Expansion (DREE), Department of Regional Industrial Expansion (DRIE) and, the latest effort, the Atlantic Canada Opportunities Agency (ACOA).

All of these programs had one common purpose; to encourage economic development in the slow-growth regions. Some of the programs, like the special area program, were directed at specific areas within the Province that were experiencing serious economic problems and were lagging behind other areas. These programs offered various instruments to encourage development, from outright cash grants to potential industry to the provision of infrastructure. For example, a special area agreement would provide for construction or improvement of the roads, water and sewer systems and schools within an area as an incentive for industrial growth.

Industrial parks were seen as a facilitator for economic development. To ensure that this facilitator was in place, a great deal of money and effort was directed at establishing industrial parks. It is extremely difficult to determine exactly how much money was directed at industrial park development by the myraid of government programs and initiatives. A major evaluation was carried out in 1979 on the effect of DREE's efforts at developing industrial parks in the Atlantic region. Up to 1979 DREE had invested $31 million in industrial parks in the region: some 5000 acres were serviced, of which slightly over half were occupied; some 769 firms had located in DREE-assisted parks, creating some 18,000 person-years of employment; and, 68 percent of the

firms were new to the communities in which they were located.[5] The evaluation raised several questions about the life expectancy of the firms involved and the turnover frequency of firms within the parks. No attempt was made to determine where the firms would have located had new parks not been constructed. A further evaluation proposed for 1982 was never carried out.

The latest available information on investment in industrial parks in New Brunswick (through the GDA and ERDA programs) indicates that approximately $5.6 million has been spent from April 1, 1985 to March 31, 1990. Under the agreements, this funding was intended "to remove constraints to new and expanded industrial growth by selective investments in the expansion of existing industrial parks and improvements in servicing standards". Infrastructure projects have included services such as roads, water, sewer and power installation to provincially and municipally owned industrial parks. This investment has been as a result of the belief that infrastructure is a key to establishment of new industry in the Province. In the capital budget for 1990-91, the Department of Commerce and Technology requested $1.6 million. The Department also identified $23 million in future infrastructure needs throughout the Province.

Most of the early efforts at industrial park development in New Brunswick bore little resemblance to the industrial park definition set out earlier. The ADB program provided assistance for industrial parks in virtually any community which showed an inclination to encourage industry location. Little concern was shown for the likely demand for such land, or whether the municipality had the capability to administer the asset. Consequently, industrial parks were developed without an appreciation of the price land should sell for, the labour force availability and the debt to be assumed by the community.

Subsequent to the ADB program, the Special Areas Program and the FRED Agreement also provided assistance for industrial parks in areas of the Province where each agreement applied. Under both of these programs, a greater concern for the demand for land suitable for industrial development weighed in the decision to invest in industrial parks. Emphasis was also placed on the relationship and location of parks relative to labour supply. Industrial Parks were developed and promoted as regional assets serving a wider labour pool area than the jurisdiction in which the park is located.

Coincident with the development of parks under each of these agreements, efforts were devoted towards the development of the local organizations which would administer and promote the park assets. Regional Industrial Commissions were set up in areas covered by both the FRED and the Special Areas Agreement.

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[5] D.R.E.E., Atlantic Region Industrial Parks: An Assessment of Economic Impacts, Ottawa, 1979.

The experience with the FRED and Special Areas Programs has shown that areas of the Province not qualifying under these agreements had been discriminated against in terms of meeting the serviced land needs of industry. This was so even though many of the areas had ADB developed parks. The problem in the latter instances was that the ADB parks were not necessarily well located to be attractive locations to industry nor was the level of servicing attractive relative to some of the newer developed parks.

With the experience of previous years in mind, the Province proposed an industrial parks program through the General Development Agreement on Industrial Development. During the past ten years the Department of Commerce and Technology has placed its efforts into doing the best it can for the large number of parks in the Province. It has not been able to meet the large demand for improvements with the very limited human and financial resources available. Despite this limitation, programs have been improving in recent years because of emphasis on critical factors such as:

- more attention to relating assistance to committed industry demand;
- more requirements for engineering feasibility studies and designs before funding is committed; and
- more emphasis on regional parks and assistance for regional economic development commissions.

2.3.2 Parks as Economic Development Tools in New Brunswick

There is still much progress to be made in New Brunswick if it is to achieve the principles set out in the earlier definition of industrial parks. Many of the industrial parks in New Brunswick have not been developed in consideration of the planning, economic and environmental objectives mentioned earlier. Although the Department of Commerce and Technology has attempted to use industrial parks as economic development tools, basic constraints have often prevented these programs from being effective. Often money has been poured into parks because they were there or because urgent infrastructure improvements were necessary or in response to pressures to accommodate a single industry that was hoped would be a catalyst for further development in the area.

Limited budgets have obviously hampered the use of industrial parks as effective economic development tools in all parts of the Province. Earlier quotations from recent consultant's reports on industrial development have referred to the importance of having suitable and quality industrial parks to attract industry. Managers of some of the more successful industrial parks in the Province reiterate that many of the industries in their parks would have located outside the Province if they had not had suitable serviced lots available to accommodate those industries when they were ready to establish. With todays increasingly competitive economic development

climate, the province and its municipalities need to have serviced industrial parks available in order to compete with neighbouring provinces who have these facilities in place.

Some of the larger and more successful parks in the province have illustrated, through employment generation, land sales and tax revenues, that industrial parks can indeed be effective tools to generate economic benefits to the Province and municipalities in which they are located. Unfortunately few parks in the Province have developed to such an extent.

2.3.3 Parks as a Planning Tool in New Brunswick

Except for a few of the larger cities, industrial parks have not been used as an effective planning tool in New Brunswick. Industrial Parks have not been established as the result of comprehensive studies based on recognized location and space requirements. During the 1960's and 1970's, when there was a drive to prepare municipal development plans, most plans merely recognized existing industries and designated and zoned the areas around them as industrial parks. Many of the plans adopted during that period were prepared in haste, and many were almost canned packages that failed to recognize the unique qualities of individual municipalities. Many were prepared quickly in response to a Department of Environment policy that preferred to see municipal plans in place so that water and sewer servicing projects, which the Department was funding, could be related to expected population and land use projections.

Thus existing sites were recognized regardless of whether they were well planned or located. In communities, with or without development plans, industrial sites were often selected because the site was owned by the municipality or the Province, not because it was particularly well studied or located for industrial development. Other times sites were selected on the basis of an existing industry or feature such as a wharf, rail line or highway. Not that these features shouldn't have been considered, but the location was not the result of a more comprehensive review based on recognized site location principles and standards such as labour supply, markets, services, and physical site constraints. For many of these parks, the municipalities adopted standard zoning regulations that had been used elsewhere and, in many cases, the zoning regulations were seldom used or enforced.

Outside of municipalities, the Department of Commerce and Technology has had no guidance from the Province regarding industrial park location. Although a regional planning structure has been set out under the Community Planning Act, the Province does not have one regional plan in place and only one area plan. There are several Basic Planning Statements in place for local service districts, however, few of those address industrial park locations. By far the majority of the Province lying outside of municipalities is unplanned with no land use plan or zoning controls in place. This has created additional problems in some areas where, rather than locate in industrial parks within the municipality, the owners have chosen to locate in the non-incorporated

areas where they are faced with lower land costs, lower taxation, lower servicing costs and no zoning restrictions.

Generally, regional and area plans are intended to provide policy direction on regional issues such as transportation, resource development, economic development, and environmental constraints or opportunities. Thus there has been no comprehensive regional analysis undertaken on which to base decisions to support industrial park development. In most cases there has been little coordination between the plans or activities of regional planning commissions and regional economic development commissions. Part of this stems from the lack of an overall strategy or policy direction from the Province with respect to development of non-incorporated areas of the Province. Several of these constraints lie beyond the control of the Department of Commerce and Technology alone. There obviously has to be coordination and cooperation with other departments, such as the Department of Municipal Affairs, as well as leadership and direction from the Cabinet level of the Provincial government.

2.3.4. Parks as Environmental Tools in New Brunswick

Until recent years, industrial parks have not been recognized in New Brunswick as a tool for environmental protection. There has been greater emphasis on the generation of employment and economic growth than on the protection of environment from effluents and other waste generated by industry. Part of the reason for lack of emphasis on the environmental aspects can again be related to the fact that no overall comprehensive planning has been associated with the establishment of most of the Province's industrial parks.

In addition, the fact that non-incorporated areas of the Province are largely unplanned and uncontrolled, in terms of land use development, presents increasing hazards for the environment. It has been too easy for industries to locate just outside the boundaries of municipalities where they can take advantage of the labour force, markets, services and facilities available in the adjacent municipality without any controls on land use or without contributing to the municipal tax base of which they are taking advantage. This not only undermines the tax base of the adjacent municipality but, because most of this development is on individual wells and individual sewage disposal systems, they pose potential dangers to groundwater depletion as well as contamination of surface and groundwater supplies.

Even in municipalities, where industries are served by sewage treatment systems, there is a recognized need that new and upgraded or expanded systems are required. However, the limited budgets within the Department of Commerce and Technology for industrial park infrastructure and within the Department of Environment or Municipal Affairs for general municipal infrastructure, do not permit the Province or the municipalities to keep up with the demand.

3.0 INFRASTRUCTURE AND LAND USE ISSUES

This chapter identifies a number of issues that relate to the ability of industrial parks to attract and retain industries. The provision of adequate infrastructure that is capable of delivering a high level of service is essential to park performance. Services such as an adequate water system that can deliver a reliable supply of water, a sewage system that is capable of treating industrial water, and roads are the essential park infrastructure components for industrial parks.

Also influencing the operation of an industrial park are land use policies and regulations within the park itself, the municipality and the province generally. There has been a move in other areas to limit parks to specific types of industries, while the situation in N.B. is one of mixed use light industry parks. The benefits of specialization of parks is examined as well as the growth pole theory of economic development as it applies to the concentrated versus dispersed industrial development in the Province.

3.1 Infrastructure Requirements and Constraints

In order for industrial parks to retain or attract new tenants, they require the ability to offer a high level of services. In particular, the performance of an industrial park can be related to the type and quantity of infrastructure it can provide. First and foremost, parks need an ample supply of serviceable land before a park can be developed. Beyond land to build on, industries require a reliable supply of water, and adequate water distribution and sewage collection as well as treatment systems with capacity for current and future industries. Industries also require an adequate road system and available and adequate electrical services.

The Fiander-Good questionnaire asked respondents to identify any present or future (within 5 years) problems that they have or feel they will have regarding infrastructure. Their replies are discussed under several headings: land availability, water system, sewer systems, sewage treatment, roads and electrical services.

3.1.1 Land Availability

The ability of a park to attract and maintain industry is closely related to the quality of the infrastructure services, and the availability of land for future expansion.

There are approximately 11,788 acres of land in the 42 industrial parks which responded to the questionnaire, with a total of 2,638 acres occupied.

A further breakdown of land occupancy on an individual park basis reveals that 23 (55%) of the parks have an occupancy rate of 25% or less. One park, Chipman Industrial, has no tenants.

Eight (19%) of the parks are in the 26% - 50% occupancy range, six (14%) are between 51% - 75% occupied, and five (12%) parks are nearing capacity with a 76% - 100% occupancy rate.

The five parks that are nearing full occupancy are of great concern since new land adjacent to the parks will need to be purchased. If adjoining land is not available, a new site will be required. See **Table 3.1** for a list of the parks that are nearing full occupancy.

3.1.2 Water System

Water system, as discussed in this section relates to the water distribution system, water supply is dealt with separately in **Section 3.2**. Water distribution systems may be linked to Municipal systems, internal park systems, or connected to individual wells. Among the 38 questionnaire respondents who indicated their type of water system, 26 were linked to municipal systems, four were internal park systems, and eight were connected to individual wells. When asked to identify any anticipated problems with their water systems, the responses by park officials was essentially split. Twenty of the 41 respondents (49%) had a water system problem while the remaining 21 (51%), had no problems with their current water system.

Of those who replied that they had a problem, most centred around the ability of the system to meet additional demand should the park attract new tenants.

Other concerns regarding problems with the water system included such comments as:

> "Water pressure is a problem because of the size of piping supplying the park."
>
> "Water pressure is a concern regarding fire protection capabilities within the park."
>
> "The present system cannot accommodate industries who require a lot of water. The park should be connected to the municipal system."
>
> "Present system is not capable of meeting much more additional demand."
>
> "Water pipes appear to be deteriorating with several water pipe breaks in recent years."
>
> "The water usage is at the limit of the process water pumping capacity, also an enclosed reservoir is needed."
>
> "If development pressures increase, the present water system will have to be extended to service more land."

The bottom line is that in order for some parks to accommodate expansion of existing tenants and to attract additional industries, they will require either a water system to be installed, or the present one to be upgraded or extended. The cost of installing or expanding a system may be

TABLE 3.1

PARKS THAT ARE NEARING FULL OCCUPANCY

Park	Size	Area Unoccupied	% Occupied
Grandview	80.0 acres	5.0 acres*	93.8%
Hartland	75.0 acres	5.0 acres	86.7%
Moncton	640.0 acres	53.0 acres	90.0%
Republic	50.0 acres	6.0 acres	88.0%
Shippagan	11.0 acres	0.0 acres	100.0%

* Privately owned but vacant

too large for a municipality, thus the province will have to continue funding infrastructure projects in industrial parks. Where possible it is preferable that industrial parks be connected to municipal water systems thereby ensuring sufficient water pressure for adequate fire protection.

Refer to **Table 3.2**, for a list of parks that have a water system problem.

3.1.3 **Sewer System** - Sewer system relates to the sewage collection system, sewage treatment systems are dealt with separately. The types of sewer collection systems identified include municipal systems, internal park systems and individual septic systems on each lot. The following is a breakdown of sewer systems identified by the respondents for the parks.

A total of 27 parks are connected to the municipal system, eight have individual septic systems on each lot, and four are connected to an internal park system. Twenty-seven (64%) of responses indicated that they have had no problems with their current sewer system.

Those parks (36%) that indicated that they had a sewer system problem now or anticipated one within the next 5 years, made the following types of comments:

> "All septic tanks, may be a problem over time."
>
> "Because of the water quality problem, the park sewage system should be connected to the town system."
>
> "Most of the sewer lines are 50 plus years old and have never been cleaned. Some are old clay pipes which would break if they were cleaned."
>
> "There is no system now, all lots contain a septic system, should be connected to the municipal system."
>
> "Cost to municipality to extend system is very high, will need assistance from the government."

It would appear that few parks have serviced land ahead with sewer. Many commented that with an increase in demand for industrial land, the extension or installation of sewer services would be necessary. A few parks commented that they required extension to the present system to meet current needs. Refer to **Table 3.2**, for a list of parks with sewer system problems.

3.1.4 **Sewage Treatment System** - Sewage Treatment Systems identified included the municipal sewage treatment plant and internal park treatment systems with a lagoon or trickling filter.

Twenty-seven respondents indicated that their park was connected to a municipal sewage collection system. Only six of the 27 respondents indicated that the park was connected to a sewage treatment system. However, discussions with Department of Environment Officials revealed that all the municipalities in the Province, with the exception of Moncton (which will have a treatment system in place next year) have some form of sewage treatment system. Thus all

TABLE 3.2

PARKS THAT IDENTIFIED PROBLEMS WITH INFRASTRUCTURE[1]
(within the next five years)

Park	Water Supply	Water System	Sewer System	Sewer Treatment	Roads	Electrical
1. Atholville Industrial Park						
2. Bas Caraquet Industrial Park					x	
3. Bathurst Forest Complex						
4. Bathurst Industrial Park					x	
5. Belledune Industrial Park						
6. Beresford Industrial Park	x	x	x		x	
7. Bouctouche Industrial Park		x	x	x	x	x
8. Campbellton Industrial Site		x	x		x	x
9. Caraquet Industrial Park	x	x		x	x	x
10. Caledonia Industrial Estates					x	
11. Chipman Industrial Park					x	
12. Champlain Industrial Park	x	x	x	x	x	
13. Chatham Industrial Park					x	
14. Clair Industrial Park					x	x
15. Dieppe Industrial Park		x	x		x	
16. Fredericton Industrial Park						
17. Fundy Aquaculture Park	x	x			x	x
18. Grand Falls Industrial Park		x		x	x	x
19. Grandview Industrial Park	x	x				x
20. Hartland Industrial Park		x				
21. Lameque Industrial Site	x	x	x		x	x
22. Lorneville Industrial Area	x	x	x	x	x	
23. Madawaska Industrial Park					x	x
24. McAdam Industrial Park						
25. McAllister Industrial Park					x	x
26. Minto Industrial Park	x	x	x	x		
27. Miramichi Industrial Park					x	
28. Moncton Industrial Park					x	
29. Nackawic Industrial Park			x	x	x	
30. Nashwaaksis Industrial Park						
31. Oromocto West Industrial Park						x

TABLE 3.2

PARKS THAT IDENTIFIED PROBLEMS WITH INFRASTRUCTURE (Cont'd)[1]
(within the next five years)

Park	Water Supply	Water System	Sewer System	Sewer Treatment	Roads	Electrical
32. Oromocto East Industrial Park					x	
33. Petit Rocher Industrial Park					x	
34. Perth Andover Industrial Park		x	x		x	x
35. Republic Industrial Park				x	x	x
36. Restigouche Industrial Park					x	
37. Rexton-Richibucto Industrial Park	x	x	x		x	x
38. Sackville Industrial Park						
39. Scoudouc Industrial Park	x	x	x	x	x	
40. Shippagan Industrial Park						
41. Spruce Lake Industrial Park	x	x	x	x	x	
42. St. Jacques Industrial Park						
43. St. Leonard Industrial Park	x	x	x	x	x	
44. St. Stephen Industrial Park				x	x	
45. Sussex Industrial Park	x	x	x	x	x	
46. Tracadie Industrial Park		x				
47. Vanier Industrial Park						
48. Victory Industrial Center						
49. Westmorland Chemical Park				x		
50. Woodstock Industrial Park (Old)	x					
51. Woodstock Industrial Park (New)					x	
52. Chippins Industrial Park						x
Totals	14	20	15	14	33	15
Percentages	34%	49%	36%	35%	75%	34%

[1]based on FGA survey results.

the respondents that indicated that the park was connected to a municipal system are also connected to a sewage treatment system.

Sixty-five percent of respondents do not have or foresee any problems (within 5 years) with their current sewage treatment system, while 14 parks indicated they would have problems.

The following comments indicate the types of problems that exist with current sewage treatment systems in industrial parks:

> "The lagoon is almost at capacity with the present level of industrial development, more industries would necessitate a larger lagoon"
>
> "Our treatment system is not designed to treat industrial sewer waste."
>
> "The present sewage treatment plant would have to be upgraded depending on the extent and quality of sewage that would be produced."
>
> "Plant would have to be improved if an industry went into the park that required more than domestic treatment."
>
> "The present services would have to be extended within 5 years to accommodate park development."
>
> "The trickling filter system is underdesigned and presently is non-functional."

As was the case with the sewage collection and water distribution systems most parks will require upgrading if development pressures increase. The cost to upgrade or install a new sewage treatment system is too great for some municipalities to handle alone, thus, the Province will have to continue to fund such infrastructure projects.

Given the possible environmental implications of malfunctioning systems or the total absence of sewage treatment systems, the Province should consider assisting municipalities as much as possible. As a means to control costs, the Province should consider establishing specific standards for effluent entering municipal sewage treatment plants. A province-wide standard relating to the quality would require any industry exceeding that level to be responsible for the necessary primary treatment required to meet the standard. Similarly all treatment plants or facilities in the Province should establish sewage volume quotas for each industrial plant it serves. These volume standards should have a value and where an industry does not fully use its quota the unused balance should be saleable to a company with an excess of sewage.

A further cost control measure would be to limit the use of funds allocated for industrial park sewage treatment to the provision of general industrial park services or upgrading. This could include the up-grading of municipal services to meet the requirements of their industrial park at the standard level. These industrial park infrastructure funds should not be employed to provide primary treatment to specific companies.

Refer to **Table 3.2**, for a list of parks with sewage treatment problems.

3.1.5 Roads

As with other services, roads are only established if there is a need for additional serviced land. There is a little road provision ahead of development.

Some feel that in order to attract industry, it is necessary to have serviced land including road systems ready for immediate development. Parks would likely have roads built and services installed ahead of development if they could afford it.

Roads were seen as not being adequate now or would require construction or upgrading to meet demand. As can be determined from **Table 3.2**, 33 parks (75%) of responses indicated a need to improve the parks road system.

3.1.6 Electrical Services

Present electrical services to parks seem to be adequate, as only 34% of the parks felt that they had a problem with electrical services. Discussion with N.B. Power officials revealed that upgrading electrical services to parks is generally not a serious problem and is done on a demand basis. Moreover N.B. Power offers a reliable supply of electrical power at reasonable rates. This should be used to attract industry to the Province.

As with other services, electrical service would be upgraded or expanded based on the demand brought on by increased industrial activity.

3.2 Water Supply Availability

3.2.1 General

The availability of an adequate supply of water is a determining factor in the location of some types of industry. Water demands will vary greatly depending on the type of industry locating in an area. The demand for water for domestic purposes and fire protection can be determined with a reasonable degree of accuracy for a given area. However, process water demands are more difficult to determine as the quantity required will depend on the actual industry, the process utilized, and the size of the industry. In many instances the amount of process water will be beyond the capabilities of a normal system. When the demand exceeds system capacity the industry may be required to establish its own supply. Cooling water is one example. An industry requiring such quantities will undoubtedly attempt to locate near a suitable source.

The availability of groundwater and surface water supplies is not uniform across the Province of New Brunswick. Water availability maps prepared by the Water Resources Branch of the Department of the Environment indicate in the western half of New Brunswick, as well as the southern portion of the province, average water yields are generally less than ten gallons per minute. Engineers at the Department of Commerce and Technology generally consider yields of 300 gallons per minute to be a reasonable minimum for industrial parks with a need for more than domestic requirements.

The rough triangle formed by Bathurst, Moncton and Fredericton has average well yields in the ten to 50 gallon per minute range. Except for the Port Elgin area which has low well yields, the extreme eastern coastal areas has relatively high yields with average well yields greater than 50 gallons per minute. The Province points out that the maps are generalizations and significant variations can occur locally. It also suggests that field testing of water yield and quality should always be carried out before proceeding with projects which have significant water supply dependency.

The provincial maps also indicate the probable yield from surface water sources around the province. It indicates higher yields generally available in the northern and western portions of the Province with the lowest yields expected in the south eastern quadrant of the Province. Care must be exercised in using such generalized data since conditions may vary for particular localized areas as well as varying with seasonal and climatic changes. Conditions may also be modified through use of artificial mechanisms such as dams and pipelines to overcome localized surface water constraints.

In order to provide a better level of detail and to assist in the rationalization of parks in the province, the services of a hydrogeological firm, Maritime Groundwater Inc., were obtained to carry out a preliminary assessment of water sources for those industrial parks in the Province not connected to a municipal system. In this assessment, the site geology, surficial and bedrock, was investigated to determine the potential for development of high yield wells in site specific areas. Information on existing water supplies was obtained from contact persons for each park. Additional information was collected from the Water Resources Branch of the Department of the Environment, from Planning Region reports and geological maps prepared by the Department of Natural Resources and Energy, as well as the Department of Environment, and from files of Maritime Groundwater Inc. that have been compiled over the past 15 years.

The following section presents a summary for each park. For those parks not on a municipal system the summary includes comments on the site geology, the potential for water resources and the water quality expected. This is followed by a summary list of all parks, including those connected to municipal systems, indicating pertinent information on yield if that information was available or able to be obtained.

Although this information provides a more detailed overview than the generalized provincial maps, care must be used in analyzing the availability of water resources. For instance, it was indicated earlier that a well yield of 300 gpm was considered a minimum for industrial parks that were required to accommodate high water users. This does not mean, for example, that an industrial park with a well yielding 100 or 200 gpm should be written off for high water users since it is likely that if there is one well in the area with a yield of 100 or 200 gpm there may be others that can be located in the same area which would have a similar yield enabling provision of over 300 gpm to the park.

However, if the indications are that well yields cannot be expected to exceed 10 or 20 gpm in an area, then this would be a location where high water users should be discouraged from locating. This does not mean that the particular industrial park shouldn't be developed or supported for other industries not requiring large quantities of water.

Likewise, there may be situations, especially in municipalities, where the water yield exceeds 300 gpm, but this may result from numerous wells and there may be other major demands on that source, such as high density residential, that could significantly reduce the amount of water available for industrial park development.

Another consideration that enters into the discussion of water availability is the requirement for fire protection. In order to supply adequate fire protection for particular types of industries water systems may be required to deliver 1500 or 2000 gpm or more. Industries must consider risks, safety and insurance costs related to fire protection.

Yet another consideration affecting water availability relates to water quality. For instance, some wells may have a fairly high yield but depending upon depths and pumping rates there could be problems with water quality such as iron, manganese and others. As an example salt water intrusion into wells is a common problem in many communities lying along the east coast of the province.

If an area has a low potential for high yield wells or suitable surface water sources, there is also the possibility of alternative measures such as pipelines from more remote surface water or groundwater sources. These alternatives are costly, however, in some cases the expense may be justified or may be absorbed by the particular industry or project. For example, low water availability in areas such as Jacquet River and Belledune have not deterred projects such as the smelter, fertilizer plant and the N.B. Power Thermal plant from locating in Belledune because of the other attributes that the location offered.

With the considerations described above in mind, the descriptions for each park which follow can assist in the rationalization of existing parks, future decisions as to expansion of these parks, and

what types of industries might best be accommodated in those parks. This information should also be one of the major considerations in the decision to establish and locate any future parks.

3.2.2. Parks Without a Municipal System

Belledune Industrial Park

This park is currently the subject of a water and sewer investigation.

Geology - Thin cover of Pennsylvanian sandstone overlying silurian sandstone and slate.

Potential for Water Resources - Good potential for groundwater in upper carboniferous strata if sufficient vertical thickness is present. Otherwise, poor resource potential. Yields of greater that 20 gpm are not anticipated. Other major water users in the area have piped in water from surface water sources (Jacquet River, Belledune River).

Water Quality - Potential for high iron and manganese. Shallow aquifer may have high base metals in the water.

Beresford Industrial Park

Geology - Silurian sandstone and slates overlying Ordovician volcanics.

Potential for Water Resources - This park is currently on individual wells. Good potential for up to 50 gpm if fault structures are intersected. Otherwise potential for bedrock wells is poor. Generally low well yield area - less than 10 gpm.

Water Quality - Potential salt water problems.

Bouctouche Industrial Park

Geology - Pennsylvanian sedimentary rocks. Excellent potential for regional faulting in this area.

Potential for Water Resources - This park is currently on individual wells. Excellent potential for location of large capacity wells in the bedrock.

Water Quality - Iron and manganese could be a problem along with hydrogen sulphide. There may also be problems due to salt water intrusion if large quantities of water are extracted. Specialized well construction may be required to isolate poor quality water.

Caraquet Industrial Park

Very little room for additional groundwater withdrawals in this area according to the representative. However, the municipality has recently developed additional wells. At present the municipality can produce up to four million gallons per day of fresh and salt groundwater.

Chipman Industrial Park

Geology - Pennsylvanian sedimentary rocks.

Potential for Water Resources - This park is currently on individual wells. Poor potential for high yield wells. Yields would not be expected to be greater than 15 gpm.

Water Quality - Potential hydrogen sulphide problems with bedrock wells also above acceptable levels of iron, manganese and salt. Designing a treatment system for water from this area is expected to be very expensive.

Clair Industrial Park

Geology - Predominantly Devonian sedimentary rocks.

Potential for Water Resources - Potential aggregate deposits along St. John River which may yield large quantities of water. Low yielding bedrock aquifers (less than 10 gpm). The park currently obtains surface water from a lake.

Water Quality - Water from the bedrock is expected to have high calcium content. Groundwater recovered from shallow aquifers along the river contains higher than acceptable manganese levels.

Fundy Aquaculture Park

This park requires a large quantity of water. It presently obtains water from the St. George municipal supply which is heavily stressed and requires additional resources to supply the park. Gravel aquifers developed along the Magaguadavic River may supply additional water. There is little to no potential for high yield wells in the immediate area of the park.

Lameque Industrial Park

Geology - Pennsylvanian sedimentary rocks.

Potential For Water Resources - Existing wells generally yield less than 20 gpm. Major fault zones may yield more. There is potential for up to 100 gpm per well. In the nearby municipal well field, wells yield up to 150 gpm.

Water Quality - There is potential for salt water problems. The static water level is close to sea level. If the wells are deeper than 30 feet the quality could be impacted by high levels of sodium and sulphate.

Lorneville Industrial Park

Geology - Mississippian, Pennsylvanian sedimentary rocks.

Potential For Water Resources - There is a low potential for high yield aquifers. Expected well yields will be less than 10 gpm, but the park may be serviced from the City of Saint John water supply.

Water Quality - No information but quality should be reasonable. Potential for salt water intrusion if the aquifer is stressed.

Minto Industrial Park

Geology - Pennsylvanian sedimentary rocks.

Potential For Water Resources - Previous groundwater supply was inadequate for the Park. A new well has been recently drilled near Newcastle Creek and it has sufficient water to meet the existing needs of the Park and the Hospital. There is also some potential to develop groundwater from aggregate deposits along Newcastle Creek.

Water Quality - The previous water supply contained high iron and manganese levels. Water quality from the new well, based on preliminary tests, are within acceptable limits for those parameters tested.

Restigouche Industrial Park

Geology - Carboniferous and/or Silurian sedimentary rocks.

Potential For Water Resources - There is low potential for high yield wells in bedrock. There may be some potential for a gravel aquifer along the Eel River. The park is currently on municipal system.

Water Quality - No information.

Rexton - Richibucto Industrial Park

Geology - Pennsylvanian sedimentary rocks.

Potential for Water Resources - This park is currently on individual wells. There is good potential for high capacity wells in the local sedimentary rocks. Special well construction could be required to isolate aquifers.

Water Quality - There is potential for salt water problems as well as high iron, manganese and hydrogen sulphide in the local aquifers.

Scoudouc Industrial Park

Geology - Pennsylvanian sedimentary rocks.

Potential For Water Resources - Poor water potential is known in the immediate area of the park but we expect better geological conditions for water to the north-northwest. Park currently obtains water from six existing wells in Pennsylvanian sedimentary rocks. Well construction to date has been expensive because of unstable bedrock strata.

Water Quality - No major water quality problems except for slightly high manganese are expected in this area.

Sussex Industrial Park

Additional on site resources are required as the demand is presently stressing the municipal system. There is potential for developing one or more high yield wells in the industrial park but because of the pollution hazards nearby, a new well field may have to be located some distance away. Bedrock aquifers are of little importance because of high calcium and sulphate (from gypsum). Gravel aquifers along the Kennebecasis River will therefore be important for future water supply development.

Tracadie Industrial Park

Geology - Pennsylvanian sedimentary rocks.

Potential For Water - There is a moderate potential for large yielding wells but there will be quality problems. Well depths should not exceed 100 feet and the pumping rate should be restricted to prevent aquifer dewatering.

Water Quality - High iron and manganese could be expected in the water but there is a real risk of salt water intrusion.

Westmorland Chemical Park

Geology - Pennsylvanian sedimentary rocks.

Potential For Water - There is good potential for high yield wells in this area. Presently the park has two wells but the capacity is unknown.

Water Quality - There is no information on the chemical quality of this water.

Woodstock (New) Industrial Park

Geology - Ordovician sedimentary and volcanic rocks.

Potential For Water - This area can support only low yielding wells. The anticipated well yields are less than 10 gpm. Potential high yield aggregate aquifers could be located along the St. John River about 1 km to the east.

Water Quality - High calcium content, all other parameters should be within acceptable limits.

Please refer to **Table 3.3** on the following pages for an overall summary of water availability of each of the industrial parks.

3.3 Land Development Controls

This sub section reviews what land use and development controls are and how they influence New Brunswick industrial parks. Industrial development outside of the parks, the limiting of the type of industry permitted to locate in the park, and the changes in industry demands for services and building are also discussed.

3.3.1 General Structure of Plans and Regulations

What are land development controls and what role do they have to play with respect to industrial parks? Controls on land use and development generally take the form of land use plans and zoning regulations. The land use plan is the main component in a comprehensive plan for a community, area or region. It reflects policies that are to guide the growth of the affected area over the next ten to 20 years. It shows the location and extent of the various land uses that are anticipated.

TABLE 3.3

SUMMARY OF WATER AVAILABILITY

INDUSTRIAL PARK	WATER SYSTEM (Municipal/Private)	SOURCE (Wells/Surface Body)	ESTIMATED YIELD OF WATER SYSTEM
Atholville	Municipal	3 Gravel Wells	412 GPM
Bas Caraquet	Municipal	Bedrock Wells	350 GPM
Bathurst Forest Complex	Private Well	Bedrock Well	50 GPM
Bathurst	Municipal	Surface Body	3800 GPM
Belledune	None	----------	------
Beresford	Individual Lot Wells	Bedrock Wells	Not Applicable
Bouctouche	Individual Lot	Bedrock Wells	Not Applicable
Campbellton	Municipal	Surface Body	1223 GPM
Caraquet	Municipal	Bedrock Wells	1990 GPM
Caledonia	Municipal	Surface Body	4000 GPM
Chipman	Private Well	Bedrock Well	Not Applicable
Champlain	Municipal	Surface Body	1282 GPM
Chatham	Municipal	8 Bedrock Wells	1282 GPM
Clair	Municipal	Surface Body	--------
Dieppe	Municipal	Surface Body	2000 GPM
Fredericton	Municipal	Gravel and Bedrock Wells	2083 GPM
Fundy Aquaculture	Municipal - St. George	Gravel Wells	380 GPM
Grand Falls	Municipal	Gravel Wells	1626 GPM
Grandview	Municipal	Surface Body	Unknown
Hartland	Municipal	2 Gravel Wells	549 GPM
Lameque	Private Well	Bedrock Well	20 GPM
Lorneville	Municipal	Surface Body	Unknown

TABLE 3.3

SUMMARY OF WATER AVAILABILITY (Cont'd)

INDUSTRIAL PARK	WATER SYSTEM (Municipal/Private)	SOURCE (Wells/Surface Body)	ESTIMATED YIELD OF WATER SYSTEM
Madawaska	Municipal	Gravel Well	Unknown
McAdam	Municipal	2 Bedrock Wells	225 GPM
McAllister	Municipal	Surface Body	Unknown
Minto	Private Well	Bedrock Well	250 GPM
Miramichi	Municipal	Bedrock Wells	1800 GPM
Moncton	Municipal	Surface Body	2000 GPM
Nackawic	Municipal	2 Gravel Wells	200 GPM
Oromocto West	Municipal	Surface Body	2083 GPM
Oromocto East	Municipal	Surface Body	2083 GPM
Petit Rocher	Municipal	Bedrock Wells	125 GPM
Perth-Andover	Municipal	2 Gravel Wells	770 GPM
Republic	Municipal	Surface Body	982 GPM
Restigouche	Municipal	----------	Unknown
Rexton - Richibucto	Individual Lot Wells	----------	Not Applicable
Sackville	Municipal	3 Bedrock Wells	832 GPM
Scoudouc	Private Wells	Bedrock Wells	400 GPM
Shippigan	Municipal	8 Bedrock Wells	2060 GPM
Spruce Lake	Municipal	Surface Body	Unknown
St. Jacques	Municipal	Surface Body and Infiltration Gallery	150 GPM
St. Leonard	Municipal	2 Gravel Wells	405 GPM
St. Stephen	Municipal	Gravel Wells	2030 GPM
Sussex	Municipal	3 Gravel Wells	1565 GPM
Tracadie	No Water Use	----------	----------
Vanier	Municipal	Fredericton Water Supply System	----------

TABLE 3.3

SUMMARY OF WATER AVAILABILITY (Cont'd)

INDUSTRIAL PARK	WATER SYSTEM (Municipal/Private)	SOURCE (Wells/Surface Body)	ESTIMATED YIELD OF WATER SYSTEM
Westmorland	Private Well	Bedrock Well	Unknown
Woodstock (Old)	Municipal	2 Gravel Wells	1701 GPM
Woodstock (New) Wells	Individual Lot	Wells	Unknown
Chippins	Municipal	----------	Unknown

The zoning regulation is the short term tool that is used to implement the land use plan. To be meaningful, zoning regulations should be based on the long term land use policies and plans. The zoning regulations are also presented in the form of a map showing the various zones into which the area is divided. It also contains a set of standards or regulations which define such items as lot area, building setbacks, heights, signage, parking and landscaping provisions that are to apply to each zone.

Comprehensive land use plans and zoning regulations are both legally adopted as by-laws by the municipality or by the Provincial government. Both require a lengthy process of public advertising and readings before they are adopted. Once adopted, they are legally binding and cannot be changed without going through a process similar to that to originally adopt the by-laws.

An industrial park is affected by plans and regulations since it is one of the major land uses, along with residential, commercial and recreation, that are included in the comprehensive plan. Generally, a comprehensive study is carried out as part of the land planning process which determines, on the basis of accepted locational and spatial principles and standards, the best location for the various uses under consideration. For industrial uses, for example, the study would select sites that meet criteria with respect to transportation routes, servicing requirements, physical suitability and compatibility with other uses and the environment. Thus the land use plan would identify the best sites in the community, area or region for industrial development. In some cases, a specific site is not selected but the policy outlines the criteria which would have to be met before a site might be selected by a council or the Province in the future.

Once a plan has been adopted, the municipality or the province then adopts the zoning regulations. Depending on the size of the community, the industrial zone or industrial park may be broken down into several sub categories of use. For example, it might designate a certain area for "heavy industry" and another area for "light industry". Larger centres with a greater diversity of uses may designate more zones such as "office commercial", "service-commercial", "warehousing/wholesaling", etc. The designation of these areas will have a significant influence on the types of industry that will eventually operate within the park. The zoning designations should obviously reflect the potential types of industries that are contemplated in the area.

The by-law also includes standards which are to apply to each industrial zone. Typical standards include the minimum size parcel or lot, the distance industrial buildings are to be set back from the street or from side or rear lot lines, the maximum height of building permitted, the number of parking spaces and loading spaces required, the size and type of signs permitted as well as any landscaping provisions that are required.

Some industrial park commissions or owners require more sophisticated controls than is afforded by the typical zoning by-law. Insistence on professional architectural designs for buildings, use of quality construction materials, more rigid requirements for landscaping and signage, time limits for

start of construction and similar requirements, are all extra controls that can be implemented through "restricted or protective covenants" which are registered on title for each property and form part of the offer to purchase or lease each lot. Each potential lot purchaser is made aware of these covenants at an early stage in negotiations and most realize that these restrictions are for their own protection as well as that of the community.

To avoid the rigidity associated with traditional zones and regulations, some municipalities prefer to use "performance standards" to control industry. That is, within the industrial zone, any use may locate as long as it performs up to a certain standard or, more correctly, does not exceed certain limits that are set for such nuisances as noise, smoke, odour, vibration, dust, traffic, etc. which might be generated by the particular industry. Such performance standards are usually required in large centres which can afford the staff and equipment necessary to police and control such standards.

3.3.2 The New Brunswick Planning Structure

In New Brunswick, the power to adopt comprehensive plans and zoning by-laws is in the hands of either municipalities or the Province. Under the Community Planning Act, municipal plans and zoning by-laws are adopted by the council of the municipality. Outside the municipalities (cities, towns and villages), all plans and by-laws are adopted by the Province through the Minister of Municipal Affairs. The plans in the non-incorporated area may be in the form of regional plans (for one of the seven planning regions), area plans (for larger rural areas) or basic planning statements (generally for Local Service Districts).

Municipal Situation

In New Brunswick most municipalities have adopted municipal plans and accompanying zoning by-laws. Of the 43 respondents who replied to the question in the questionnaire, approximately 75% indicated their park had some type of regulation or by-law covering the normal zoning standards. As pointed out in Chapter 2, with the exception of a few of the larger cities, the industrial parks designated in most of these plans were not the result of a comprehensive site analysis. The location may have been selected in recognition of an existing concentration of industry; because the site happened to be owned by the municipality or the province; because of access to the major highway or because of the location of a resource or features (such as a water supply, wharf, rail line or a natural resource). Seldom was any thought given to other major locational factors such as labour supply, markets, environmental or climatic features as well as a comprehensive physical analysis of the site.

In addition, the fact that a community designates an industrial park does not guarantee that industry will locate in the park or will not locate elsewhere in the municipality. Few municipal

councils have the will to turn down an industry that is going to create jobs and added tax base if it wants to locate in areas outside the designated park.

Many municipalities adopted standard zoning regulations that may or may not have been applicable to their own unique circumstances or preferences. Again, with the exception of some municipalities which have the human and financial resources to do it, few of these zoning regulations have been able to be implemented and enforced. In reality, many communities are content to be able to attract industries to the park and do not tend to be too fussy on whether the details in the zoning by-law are enforced.

Rural Situation

As pointed out in chapter 2, there are no regional plans in effect in New Brunswick. Only one area plan has been adopted and several basic planning statements have been adopted for non-incorporated communities. The majority of the Province, outside of municipalities, is not subject to any land use plans or zoning controls. This situation has created problems with respect to urban sprawl on the fringes of municipalities. The fact that land values and tax rates are lower in non-incorporated areas combined with the lack of land use and zoning restrictions has attracted all types of development, including industrial, to the unincorporated areas outside municipal boundaries. It should not be surprising then that over the past 20 years in New Brunswick, the population in non-incorporated areas has steadily increased from 226, 291 in 1971 35.7 percent of the total provincial population) to 282, 590 in 1986 (39.8 percent). This has occurred despite the fact that several municipalities have been incorporated in the Province over that same period. Growth has thus been increasing in those areas of the Province where it is most difficult to deal with i.e. no plans, no zoning, no municipal services.

As pointed out earlier, this has been to the detriment of adjacent municipalities. The capital city of Fredericton presents an excellent illustration of the problems created. Over the 1971 to 1980 period noted above, the Vanier Industrial Park in Fredericton sat virtually empty. However, non-incorporated areas on the outskirts of the city, such as Hanwell Road and Lower St. Mary's, experienced a tremendous growth of residential and industrial development. Industrial uses such as truck depots, warehouses, bulk fuel storage, construction companies, small offices, and industrial malls all located along the Hanwell Road within a few minutes of the Trans Canada Highway. These developments had absolutely no control in the form of plans on zoning by-laws and all companies created their own individual wells and septic tanks. These developments seriously affected the growth of the Vanier Industrial Park, represented lost tax base to the City of Fredericton and has the potential to result in future community land use conflicts and environmental problems in the Hanwell Road area. The same potential for this kind of problem exists outside most municipalities in the Province.

3.3.3 Industrial Development Outside Parks

The whole issue of support for industrial development outside parks is a difficult issue to deal with. The questionnaire asked whether or not the Department of Commerce and Technology should support a project located outside of an industrial park. Reference to this question (15A) in **Appendix A** indicated that 26 of the 37 respondents, or 70%, replied that, yes, development outside parks should be supported. However, most of these replies were qualified or had conditions attached. These conditions included:

- only with the consent of the municipality;
- yes, but strongly encourage location in the park;
- if it met municipal zoning;
- only if the industrial park is full; and
- if the industry is not suited to the park for some reason.

Question 15B of the questionnaire asked if industrial development outside parks (either within the municipality or outside the municipality) was an impediment to park development. With respect to development outside the park but within municipal boundaries, the overall responses were almost evenly split with 47% indicating it was an impediment if inside the boundaries and 54% saying it was an impediment if outside municipal boundaries.

It is more meaningful to further subdivide responses according to park ownership. Municipalities were much more concerned if development were to locate outside their boundaries. As long as it was inside their boundaries, it was creating jobs and was contributing to the tax base. Some added that it should only be permitted outside the park if it would not require additional infrastructure. Some municipalities also pointed out that some older industrial areas, perhaps abandoned, should be supported for redevelopment even if they are located outside designated parks.

The economic commissions were split on the issue in terms of development within the municipality (four said it was an impediment and five said no) while seven of the 11 responding said location outside the municipal boundaries was not an impediment. The economic commissions are more concerned with economic development generally, thus they are not as concerned with development outside parks as long as it is within their region.

The provincially owned parks are split on this issue which is a result of the fact that four of its parks are located in non-incorporated areas while six are in municipalities. Park officials from

provincially owned parks in Moncton and Saint John, for example, naturally favour development being supported within their industrial parks located in the respective municipalities. On the other hand, officials responsible for those provincially owned parks in non-incorporated areas (like Scoudouc and Bayside) obviously wish to attract industry to their parks even though they are not located within municipal boundaries.

Many of the comments from follow-up interviews reflected similar opinions to those expressed in the questionnaire. Most of those interviewed felt the greatest value in industrial development comes from the employment generated regardless of location inside parks or inside or outside of municipal boundaries.

It must also be recognized that most of the development occurring outside of industrial parks is done without any provincial government financial support. Thus, even if the Department pursued a hard line of support of industries only if they located in designated industrial parks, there could still continue to be a lot of industrial uses located outside of parks. The onus then falls to the municipality to control development within its boundaries through municipal plans and zoning designations. This would have to be accompanied by a hard line on rezoning applications outside parks. Municipalities could also attempt to retain industries that might locate outside their boundaries through more creative or innovative developments. For instance, many small industries do not locate in industrial parks because of the high serviced land costs and the stringent requirements on building specifications, both of which they cannot afford. If the municipalities were to offer smaller spaces in multi-tenant buildings or incubator malls within industrial parks, perhaps some of these smaller industries could be in a position to consider remaining within the municipality.

There is also a large responsibility on the Provincial government, through the Department of Municipal Affairs, to prepare land use plans for non-incorporated areas which would establish policies to limit and control industrial development on the outskirts of municipalities. These could take the form of regional plans in which policies would be based on regional issues such as transportation, resource development, environmental protection or smaller area plans and basic planning statements which are better able to address the issues of urban sprawl and urban fringe development. These expanded roles and responsibilities for municipalities and the Province have to be addressed in any rationalization of industrial parks in the province.

3.3.4 Specialization versus Diversification of Industries Within Parks

The questionnaire also dealt with the issue of specialization within industrial parks. In response to the question (17B) of whether or not parks should be limited to specific types of industry, 25 of the 38 responses (66 percent) indicated yes and most felt that parks should be limited to manufacturing, processing and wholesale trade types of industry. It was also pointed out that limiting a park to specific types of industries is something that most parks cannot afford to do.

Historically, the Department of Commerce and Technology has favoured the establishment of manufacturing and processing types of industries in industrial parks. It was felt that these forms of industrial activity maximize the economic impacts. Increasingly as observed in Moncton, Dieppe, Bathurst and Burnside, industrial parks are becoming the location for commercial, service, office and other related service/tertiary sector activities.

Some park administrators welcome these type of activities, while others look on them less favourably. Some feel that since the park was built to accommodate "industry", and that in some cases it was established with a great deal of public funding, it is not appropriate to allow retail/commercial or service operations into the park since the land is so heavily subsidized. "Industrial parks should not accommodate activities to the detriment of other more suitable locations, for instance, the central business area of the municipality", is a common response of those people who are opposed to non-traditional development in industrial parks. Others in favour of traditional industries expressed the opinion that industrial park land is scarce and should be reserved for industrial rather than commercial uses.

Despite the response to the questionnaire, there is a clear trend to more mixed industrial and commercial uses in parks. There were a number of comments expressed in the questionnaire replies and during the interviews which favoured mixed-use. Some of these comments referred to the following points:

- Parks should respond to changing market needs and trends as expressed by the private sector, i.e., more commercial uses;

- Commercial as well as industrial uses should be permitted in industrial parks as long as it meets the zoning requirements and is compatible with neighbouring uses;

- If business wants to locate in the parks and it creates jobs, tax revenues and other spin-off businesses, why not?

- Smaller parks need a mix to survive and as parks grow larger the tenants favour mixed use to provide business services such as banks, restaurants, day cares, etc.

- Several people commented that the term "industrial park" still conjures up negative images in some people's minds. Many people favour the term "business park" as more positive and more marketable.

When asked if it would be appropriate to establish zones in the park that would designate specific areas for heavy industry, light industry, commercial retail or service zones, 79 percent of the 38 respondents replied yes, but their responses were also heavily qualified. The general consensus seemed to be that, although it was a good idea, different zones within the park is

difficult to achieve in existing parks that are mainly mixed use and it is probably best suited to new or larger parks.

Whether or not it was specifically zoned, there was general agreement that heavy industry should be separated from lighter types of industry. This was related to aesthetic and safety concerns. It is especially true if the park contains dangerous or hazardous goods or uses. "Tank farms" or bulk fuel storage, for instance, were mentioned as examples of uses that should be isolated within the park. Burnside Industrial Park uses the information on a "prospective tenant form" to determine if the use should be directed to a particular area of the park with similar uses.

There are certain benefits that can be derived from having a concentration of complementary types of industry in a park. Similar types of industries have common needs regarding infrastructure. These needs can be more economically met, if they are located in the same park or area of the park. Users that require rail access or secondary sewage treatment, for instance, could be located within the same area of the park. In addition, the potential for induced economic benefits are greater if compatible and complementary industries are located close to one another.

If a mega project (oil refinery, power plant) is initiated in an area, it may be appropriate to establish an industrial park to accommodate the support industries that may be related to the project. Industrial parks in Belledune and Lorneville, for instance, might respond to such a need. Also, if a sector of the economy is identified as a potential growth sector, then creating an industrial/business park dedicated to taking advantage of this economic potential, should be considered. Agriculture parks or R&D (research and development) uses are examples of the latter. Industrial malls or incubator malls are also examples of specific types of uses that could be associated with R&D types of industry. Such buildings would be more appropriate to the experimentation nature and small scale often associated with R&D types of use.

3.3.5 Changes in Demand For Types of Services or Buildings

The questionnaire asked park officials to identify in demand for different types of service or buildings in industrial parks. The most frequent comments regarding changes in demand for services included the following:

- With respect to transportation, there has been a definite shift from rail to trucking;
- With respect to municipal services, there are increasing demands for more and better quality water; as well, more concern for disposal of sewage and other wastes.
- Because of the increasing demand from commercial types of business, there is also a need for smaller lot sizes in industrial parks.

In response to the question of demand for the establishment of malls, modular warehouses or multi-tenant buildings, 24 of the 42 who responded indicated interest or inquires for these types of facilities. Thirty-eight percent of those responding had requests regarding industrial malls and multi-tenant buildings, 29 percent had interest in incubator malls and eight percent had interest in modular warehouses. The majority of respondents (67%) felt that such types of development should be private sector initiatives. These types of uses are generally in response to a market demand and should not require subsidization. Several people interviewed expressed the opinion that governments should not be erecting these types of buildings in competition with the private sector. Several respondents (25 percent) felt government should be involved. This included initiation by government with provincial funding for construction. It was suggested that the municipality be responsible for administration. A smaller number (8%) felt there should be a joint effort with publicly funded infrastructure and the private sector provide the building. Others felt that such uses should be subsidized by the public sector for a start-up period of three to five years.

3.4 Concentrated Versus Dispersed Industrial Development

The issue of whether industrial development should be concentrated in particular centres (growth pole concept) as opposed to being dispersed throughout a larger area, has been a controversial subject of discussion in Canada whether it is considered at the national, provincial or regional level.

The "growth pole" concept formed one of the foundations of the first policy and program structure for the Department of Regional and Economic Expansion. Economists such as Francois Perroux have maintained that economic activity tends to concentrate around certain focal points. He argued that growth does not appear everywhere at once; it reveals itself in certain points or poles, with different degrees of intensity; it spreads through diverse channels.[1] It was felt by Perroux that if these local points are strengthened then it will start a process of self-sustaining economic growth.

The concept of growth poles was expanded on by J.R. Boudeville, who suggested that "a regional growth pole is a set of expanding industries located in an urban area and inducing further development of economic activity, throughout its zone of influence".[2] With the growth pole theory in mind, it could be argued that in order to maximize economic benefits, industries should be concentrated in one centre, probably an urban area with adequate industrial parks.

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[1] Donald J. Savoie, Regional Economic Development: Canada's Search for Solutions, University of Toronto Press, 1986.

[2] Savoie, p.6.

Some of the early federal "regional" development programs initiated during the 1960's, such as ARDA and FRED, were aimed at reducing rural poverty. The FRED program could only be applied in designated regions, with low incomes and major problems of economic adjustment.

The federal government attempted to implement the growth-pole concept through several programs during the 1970's and 1980's. For instance, the Regional Development Incentives Act (RDIA) and the special areas program shared the same objective of encouraging manufacturing and processing industry in slow growth regions. They were based on choosing industrial centres with the potential for attracting manufacturing and processing firms and, through a special federal/provincial agreement, infrastructure was provided within which industrial growth could occur. It was hoped the RDIA, through cash grants, would be able to attract new manufacturing industry to the selected centres.

The DREE programs introduced during the 1960's and early 1970's favoured industrialization and strong urban growth centres and was moving away from schemes to alleviate rural poverty and encourage rural based development. The growth pole concept has many merits in theory. A concentration of development in limited areas which have the greatest potential for growth seems economically sound and functionally efficient. It makes sense to steer development to areas that can provide the "climate" for economic growth and development. This climate includes a more specialized labour force, sufficient infrastructure, transportation networks and a wider range of support services.

After the 1973 federal election, and a general review of DREE policies, an analysis by Donald J. Savoie points out that "From an economic perspective, the growth-pole concept was now out of favour in Ottawa; the new password to DREE funds was "developmental opportunities". DREE would pursue viable opportunities whether they were in urban or rural areas, though it would be preferable if they were located in slow growth regions, and priority status would still be given to these."[3]

Over the years the Provincial governments were hesitant to take the lead in growth centre movements at the sub-provincial or regional level. They have attempted to remain geographically neutral in economic development, seeking to attract new economic activities to their provinces regardless of location. Savoie also presents a New Brunswick example to illustrate this point. After stating that provincial governments have made comprehensive efforts at regional development at the sub-provincial level only after DREE had promoted the idea and funded much

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[3] Savoie, P.47.

of the cost, he points out that "New Brunswick agreed to a $90 million economic development plan for the northeast only after DREE had agreed to pay 80 percent of the cost."[4]

An examination of funding assistance provided in New Brunswick over the past ten years indicates an emphasis on a balanced or dispersed approach. This is not surprising considering the Province has set up 12 regional economic development commissions and has approximately 50 industrial parks to consider. Even though the concentrated approach makes sense in theory, a rigid application of the concept in the New Brunswick context would not be politically acceptable. In New Brunswick's case the issue is also complicated by the ownership structure. With the Province owning ten parks, the regional economic commissions owning 12 and municipalities owning 28, the Province is in an extremely difficult position. If it supports its own parks financially or steers new industry to its own parks, the Province naturally opens up the door for all kinds of criticism regarding unequitable treatment and political interference.

It almost seems academic to discuss the growth pole concept when the Province has already invested heavily in most of the 50 established parks that are dispersed all around the Province. Although there was no specific question on the questionnaire with respect to concentrated versus dispersed development, comments on the concept were made during the interviews.

Although there was recognition that it would be economically expedient for the Province to invest in the larger centres, there was also the feeling expressed that the Province was also obligated to continue to support smaller centres where there was already an investment in infrastructure. From a social point of view this also permits more people to be employed while remaining in their home area.

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[4] Donald J. Savoie, Federal Provincial Collaboration, Chap.5.

4.0 PARK ECONOMIC & PERFORMANCE ISSUES

This chapter discusses issues related to the economic performance of industrial parks. The selling prices for park land, utilization of those revenues, and the types of agents used to sell land by various parks is reviewed.

Subsequently, present methods of park promotion are considered along with suggested improvements.

A general review of industrial park performance is provided followed by a discussion of the types of benefits which accrue from the parks. Finally, a detailed review of the costs and benefits of the Bathurst and Moncton Industrial Parks is provided.

4.1 Fee Structure/Land Sales

This section discusses issues related to the sale of land in the industrial parks, the prices charged for lots, utilization of revenues, and the types of sales agents used. Information provided is based on data received from the park questionnaires and through interviews with persons knowledgable about the parks.

4.1.1 Selling Prices

Park representatives were asked to provide the recent average selling price of land in their parks. For 34 responses received, the current selling price of serviced land ranged from $2,000-$32,500 per acre, with an average of about $9,618 per acre. Surprisingly, fully 50 percent of the responses indicated serviced land is sold for $5,500 or less per acre. Only four parks indicated selling prices of $21,000 or higher.

Only eight responses were received providing a selling price for unserviced land. The range in price for unserviced land was $2,000-$5,500 per acre, with an average price of $3,688. Half the responses indicated a price between $2,000-$3,000.

It should be noted that for the eight respondents who provided separate costs for purchasing land, building roads, and providing services in the parks, the average cost was $31,400. This indicates that only one park (Oromocto West), which is almost full, is recovering the full development costs of serviced land through park land sales. This key statistic clearly indicates that with an average selling price of $9,618 per acre for all responses received, the parks are far from being able to be self-sufficient from land sales.

Park officials were asked if they considered the current selling price of land in their parks reasonable. Of the thirty-eight responses, 58 percent considered the present price okay, 39

percent considered the price too low, and only one respondent felt it was too high. Some of the responses indicated that the price charged takes into account the quality of the land and prices of competing land for industrial purposes within the locality where the respective park is located. Some who felt that the price was too low, felt it had to be kept low so as to compete with cheap land outside municipal boundaries. Park official's responses indicated that 63 percent of them considered that the selling price of land in the parks was a significant factor influencing park land sales and consequently this factor certainly has an impact on maintaining the low prices charged in relation to overall land development costs.

A total of 68 percent of all respondents stated that selling land below development costs was important in attracting new business to their parks. Many persons commented that they felt their parks would not be able to attract tenants if the price reflected full development cost. However, it was also felt that location, quality of services, transportation services available, and relative land availability were also important factors.

The comments concerning the difficulty of competing with cheap land in unincorporated areas certainly suggest that some form of overall provincial regulation of industrial development may be required if industrial parks in small communities are to successfully serve their role as a land use planning tool in providing an area zoned for industrial development.

In general terms it was recognized that the prices charged for park land must vary with the market conditions impacting the individual park. Although none of the parks in the province are developed to the stage where they can set land prices so as to recover full development costs, it would appear that the relatively successful parks in the Moncton area are reaching the stage where the prices charged approximately cover the costs of servicing the land. Unfortunately future land purchases for continued development of a park like Moncton Industrial Park, for example, will be very expensive.

4.1.2 Revenue Utilization

When asked how the revenue from land sales should be utilized, the majority of the respondents indicated that the revenues should be used for future park development. Many of the 26 responses suggested that 10-20 percent should go towards park promotion; 20-30 percent toward new land acquisition, 45-65 percent for infrastructure improvements, and 10-20 percent for administration costs. A few of the responses indicated that part or all of the revenues from land sales should simply go to general revenues.

Ideally all revenues from land sales would go into a park development fund set up by the park owners from which to partially finance future infrastructure needs.

A special arrangement exists for the two parks in Moncton (Moncton and Caledonia) and the two in Saint John (McAllister & Spruce Lake) owned by the province with regard to prices charged for land and the allocation of these revenues. For each acre of land sold in these four parks, the province receives $11,800 with the remainder staying in the municipal organization which administers the park.

For Moncton Industrial (average selling price $22,000/acre) and Caledonia (average selling price $19,000/acre) one half of the balance goes to a park development fund and the other half goes to the City as payment for a previous debt of Moncton Industrial Development Ltd. In the case of Caledonia, this results in only $3,600 per acre of land sold being assigned to the park development fund.

In the case of the two Saint John parks, the recent selling price at McAllister was only $13,000 per acre and at Spruce Lake, $15,000 per acre. In such a situation if there were 10 acres per year sold at McAllister, and all revenue retained by the City were applied to a park development fund, it would only generate $12,000 per year. This might be an appropriate promotional budget but it certainly does not enable a fund to be established for future park development.

4.1.3 Sales Agents

Several questions on the FGA survey were intended to solicit information regarding issues related to the selling of land in the parks. Questionnaire respondents indicated that land sales are currently handled approximately equally by Municipalities and Economic Development Commissions. The land in 14 parks is sold by Commissions, in eight parks by Commissions in association with others; in 14 parks land is sold by Municipalities, and in another seven parks by Municipalities in association with others. The Province is responsible for land sales in three parks and in association with a Municipality or Commission in two other parks. Only one response indicated the use of real estate agents.

When park representatives were asked whether they thought someone besides their own organization should be responsible for land sales, those who responded generally indicated that land sales responsibility should be shared with another organization. Nine responses indicated Municipalities should play a role, while three responses indicated Commissions, three indicated real estate agents, and two indicated the Province.

A number of questionnaire respondents and persons interviewed felt strongly that commercial real estate agents should be used to promote industrial park sales. This practice has been frowned upon by the Department of Commerce and Technology. However, failure to make use of real estate agents is looked upon by many as an opportunity missed. For example, there are estimated to be more than thirty real estate agents in the Moncton area who are sales agents for commercial property. These agents, connected to their international communications networks,

are sometimes retained by large firms seeking new industrial sites. If real estate agents are excluded from receiving fees for selling industrial park land, then financial self interest will lead them to steer their clients to all possible locations except the industrial parks. This is unfortunate, not only for future park development, but for the long term effectiveness of industrial development. A key point with real estate agents is that they are only rewarded for success. No up front retainer would be paid, and the agents would only collect a fee (say 5%) if and when they succeed in selling park property.

Realtors are out to make money and accommodate their clients, so they will tend to show industrial clients the parks, the city, and the benefits of locating there. The use of zoning regulations, and covenants, should alleviate concerns about possible sales to unsuitable clients. Professional realtors deal with restrictive covenants and must be cognisant of them. Moreover, if a realtor attracted a client's interest to a park and that client's proposed land use is deemed unsuitable, then, from a general business development perspective, the community may still have an opportunity to attract the client to an alternative site.

4.2 Park Promotion

4.2.1 Present Methods

Based on information received through interviews, surveys and research, the present methods of park promotion in New Brunswick were reviewed with respect to how park promotion might be improved and who should be involved in park promotion.

The respondents were asked to identify which methods of park promotion they are currently using. Based on the thirty seven responses received from those parks that use some form of promotion, the following is the breakdown of promotional methods currently being used:

Brochures: 20 (54%)
Magazines: 6 (16%)
News Media: 8 (22%)
Trade Publications: 9 (24%)
Trade Shows/Conventions: 5 (14%)
Other: 19 (51%)

Most parks used a number of these methods in combination with other ones. The most common methods used for promotion was brochures. Over half (54%) used brochures. Of these only four (11%) used brochures alone. The quality and form of brochures used ranged from a simple fact sheet detailing park size, space occupied, services available and tax rate to a more detailed socio-economic profile of the region. The socio-economic profiles present the parks as an integral part of the economic structure for the region. In some cases parks had no fact sheet

that could be used for promotion. While most (43%) used brochures in combination with other methods. The most popular combination was using the brochure in conjunction with promotional activities of the Economic Development Commissions (five of 37 responses).

Only two (5.4%) of the 37 respondents used all the methods of promotion. Eight of the 37 respondents used only one of the promotional methods. In most cases, the Regional Economic Development Commission was relied on for promotion of the park. Some park owners relied on word of mouth or a sign at the entrance of their park for promotion.

4.2.2 Suggested Improvements

The respondents were asked to suggest ways in which promotion of parks could be improved. As revealed above,there are a number of promotional methods being used, and there is great variation in the quality of the material. To gain some consistency, it was generally felt that a standard approach for promotion across the province was needed.

Twenty-six percent of respondents were of the opinion that there was a need to have better promotional material in the form of professionally produced brochures.

Many of the respondents suggested that the Province has a role to play in promoting parks. Furthermore, they continued, it should adopt a standard province-wide approach, and should be more actively seeking potential industries.

Many replied that the economic commissions required larger budgets to effectively promote the parks. Some respondents said Commissions should become more aggressive and increase their promotional activities.

In order to attract potential industries, the answers stated that there must be a wider promotional effort than just promoting the park, that the province as a whole needs to be better promoted, and that the park should be promoted as part of the municipality and the region.

In order to improve park promotion respondents were asked who else should be promoting the industrial parks. The responses identified the two main players as, the Province and the municipalities. Provincial agencies were identified by 19 (59.3%) of the respondents as being potential promoters of the parks. A typical response with respect to the type of role the province should be playing was "The provincial government should be promoting the province as a business location. Parks as such are part of that promotional effort."

If a park is located within municipal boundaries, the municipality has the most to gain by the success of the park. This was evident by the considerable number (17 of 32 or 53%) of

respondents who felt that the municipality has an important role to play, either by itself or in conjunction with others, in the promotion of the park.

The Commissions were also viewed as having a role to play in industrial park promotion. Four respondents (12.5%) identified the commission as the sole promotion agent of parks, while another three (9.4%) saw the commission promoting parks in conjunction with the municipalities and the province. The answers indicated that in order to improve the promotional activities of the commissions it would be necessary for their budgets to be increased.

4.3 Park Performance

The success of an industrial park is most often determined by the positive impacts it has on the economy of an area. Economic indicators such as the number and types of jobs created, and the activities within the park are used to evaluate park performance.

Employment creation (or retention) is by far the most significant factor used to measure park performance. Tangible measures such as employment, an increase in the non-residential tax base and increased local spending, are easy to determine and thus are most often used to measure the performance of an industrial park.

There are also non-tangible indicators of park performance that can't be measured the way economic indicators can. Such things as the reduction in land use conflicts, community pride, the security of a diversified economy that may be facilitated by the industrial park and a positive investment climate are all indicators that are related to the performance of an industrial park.

Measuring park performance is a relative issue, and is most frequently related to park ownership. A municipal council may measure the success of their park on the improved tax base, employment and greater diversity of the economy. Also a municipality may measure park performance as a solution to land use conflicts.

The provincial government may simply measure park performance by the number of lots that they have been able to sell in the park. An Economic Development Commission whose mandate is to foster economic development in a region, may base park performance on jobs created, regardless of actual location as long as it is within its region.

Rating park performance is a relative and very subjective exercise. While performance as noted above, is related to the objectives of the park administrator/owner, the success of a specific park is dependant on a number of factors, including location of the park, the health of the local economy, and local entrepreneurship. All of these factors contribute to the performance of the park. A park located in the north-east of the province may be performing well for that region,

but were it located in the south-east, its performance would be measured against the local economic situation there and it might be only considered as performing fair.

Respondents were asked to rate the performance of their park. Some specified terms such as excellent; good or poor to describe the performance of their park, while others used statements such as "land sales have been excellent and a present demand is evident".

According to the responses, only two parks considered their performance to be excellent. These parks were located in Saint John and Moncton, and both are well established parks and the demand for land is strongest in these areas. Most parks were rated in the very good to good range, while a significant portion (26%) of the respondents felt that their park was performing poorly.

According to respondents park performance could be improved if a major development occurred in the park and the aesthetics of the park were improved (31%).

In order to improve park performance a number of respondents (22%) felt that the park needed to be better promoted. Also improving and installing new infrastructure in the parks would improve the performance of the parks, according to 17 percent of the respondents.

In summary then, the performance of an industrial park is related to a number of factors ranging from the economy (local, provincial and national), park infrastructure, efforts of the parks administration and the overall goals held for the park by the park owner. The next section provides one method of evaluating park performance.

4.4 Socio-Economic Evaluation of Industrial Parks

Many of New Brunswick's industrial parks have been established for over twenty years, yet their socio-economic impact on the economy of the Province has largely been taken for granted or else is not really understood or appreciated. Traditionally the parks have been considered an economic development tool. In recent years, however, as government programs get more and more squeezed for funds, it is not surprising that some politicians want to know what benefits they obtain from spending tax payers dollars to service industrial land. Stated bluntly, putting water and sewer pipes in the ground does not grab media attention nor is it deemed to attract votes as much as the opening of a new business and the creation of jobs.

This section first reviews the general types of benefits accruing from the parks as identified by park officials in their responses to a questionnaire, and during interviews. Following this general review, a more detailed assessment of the benefits accruing from two successful parks - Bathurst and Moncton Industrial Parks - is provided.

A fundamental point to be understood is that an industrial park is only a vehicle - it doesn't perform it's job without a skilled driver. Based on the large number of parks established throughout the province it appears that virtually every community wants the vehicle, but unfortunately few have the calibre of driver required to guide it to success.

There is currently a plethora of community and government groups pursuing the elusive goal of economic development in this province. An incomplete listing includes the following:

Province	chiefly Commerce & Technology, but also resource management departments including Agriculture, Fisheries & Aquaculture, Tourism Recreation & Heritage, Natural Resources and Energy, Labour.
Government of Canada	primarily ACOA, but also Industry, Science and Technology, Fisheries and Oceans, EIC programs including several Community Futures Committees and Business Development Centres.
Regional	Economic Development Commissions -12 Regional Opportunity Centres (C&T)- 5 District Planning Commissions Federal Business Development Bank Branches ACOA Branch Offices
Municipal	Economic Development Departments Chambers of Commerce City Councils Planning Departments Business Development Boards Boards of Trade

Many of these groups have common objectives as well as overlapping yet differing geographical boundaries to the areas they serve. In order for industrial parks to be an effective economic development and land use planning tool, there must exist a spirit of cooperation and a high degree of coordination among all these groups. Each and every group must be aware of the comparative strengths and weaknesses of the park(s) within their geographic region.

Having said this, it is interesting to review the responses provided by park officials to a question which asked them to identify the nature and extent of the economic, social, environmental and other benefits that have accrued to the community as a result of their industrial parks.

4.4.1 General Benefits

Economic Benefits - A total of 36 respondents identified one or more economic benefits derived from their parks as follows:

Category of Benefit	# Responses
Jobs	27
Increase in Tax Base	22
Multiplier effects from spending	8
Major Capital expenditures	3
Other	13

Typical responses seemed to indicate that the direct jobs created by firms in the park generated additional taxes and has positive economic ramifications throughout the whole community as a result of multiplier effects. The study Team attempted to quantify some of the direct benefits.

Information was received regarding the number of businesses and the number of employees in parks. The total number of businesses in the parks and the estimated employment is provided in **Table 4.1**. It must be emphasized that for some of the parks (those marked with an asterisk) the number of jobs were estimated by the Study Team based on incomplete data. A total of 571 businesses are located in the 42 parks for which information was received. For the 42 parks for which employment estimates were prepared, 11,194-12,459 persons are employed. This represents approximately four percent of the total employment in the Province in private, public and institutional sectors.

A total of 38 parks provided information on the assessed value and taxes paid by the businesses located there. This information is presented in **Table 4.2**. Once again the reader is cautioned that even for some of these parks, the data provided was incomplete. In fact only a few parks provided the assessed value and taxes on unsold lands. For that reason the taxes, as tabled, are representative of the total property tax revenues accruing to the municipal and provincial governments from the businesses located in the parks. For the 38 parks, a total assessed value of $282.2 million and annual taxes of $11.8 million were identified.

It is obvious based on these employment and property tax figures that the businesses located in the industrial parks are major contributors to the economic performance of the province.

Social Benefits - A total of 22 questionnaires recorded the nature of social benefits realized from the parks. Some of these responses overlap the answers provided for economic benefits. Most common responses included the following:

Table 4.1

NUMBER OF BUSINESSES AND EMPLOYEES IN NEW BRUNSWICK INDUSTRIAL PARKS

Respondents	# of Businesses	Low # of Employees	High # of Employees
1. Atholville Industrial Park	4*	10*	13*
2. Bas Caraquet Industrial Park	6	225	225
3. Bathurst Forest Complex	1	30	45
4. Bathurst Industrial Park	16	387	387
5. Belledune Industrial Park	ND	ND	ND
6. Beresford Industrial Park	4	55	55
7. Bouctouche Industrial Park	8*	34*	46*
8. Campbellton Industrial Site	NI	NI	NI
9. Caraquet Industrial Park	3	125	125
10. Caledonia Industrial Estates	26	745	745
11. Chipman Industrial Park	0	0	0
12. Champlain Industrial Park	7*	40*	45*
13. Chatham Industrial Park	11	85	85
14. Clair Industrial Park	3*	108*	123*
15. Dieppe Industrial Park	49	1461	1586
16. Fredericton Industrial Park	72	581*	777*
17. Fundy Aquaculture Park	5*	79	84
18. Grand Falls Industrial Park	8*	52*	100*
19. Grandview Industrial Park	48	846	1054
20. Hartland Industrial Park	11	209	244
21. Lameque Industrial Site	0	0	0
22. Lorneville Industrial Area	1	200*	200*
23. Madawaska Industrial Park	NI	NI	NI
24. McAdam Industrial Park	3	24*	24*
25. McAllister Industrial Park	10	120	120
26. Minto Industrial Park	6*	130	179
27. Miramichi Industrial Park	41	225	225
28. Moncton Industrial Park	94	2953	2953

*Incomplete data
ND - park not developed yet
NI - no information provided

Table 4.1

NUMBER OF BUSINESSES AND EMPLOYEES
IN NEW BRUNSWICK INDUSTRIAL PARKS (Cont'd)

Respondents	# of Businesses	Low # of Employees	High # of Employees
29. Nackawic Industrial Park	10	54	62
30. Nashwaaksis Industrial Park	ND	ND	ND
31. Oromocto West	NI	NI	NI
32. Oromocto East Industrial Park	NI	NI	NI
33. Petit Rocher Industrial Park	2*	21*	21*
34. Perth Andover Industrial Park	2*	8*	8*
35. Republic Industrial Park	15	192	192
36. Restigouche Industrial Park	5	69	69
37. Rexton-Richibucto Industrial Park	1	65	92
38. Sackville Industrial Park	9	16	24
39. Scoudouc Industrial Park	10*	544*	879*
40. Shippagan Industrial Park	2	62	62
41. Spruce Lake Industrial Park	17	246	246
42. St. Jacques Industrial Park	6	87	87
43. St. Leonard Industrial Park	6	103	130
44. St. Stephen Industrial Park	1	250	250
45. Sussex Industrial Park	23	423	488
46. Tracadie Industrial Park	5	9*	9*
47. Vanier Industrial Park	6	13*	17*
48. Victory Industrial Park	NI	NI	NI
49. Westmorland Chemical Park	1*	125	200
50. Woodstock Industrial Park (Old)	13	183	183
51. Woodstock Industrial Park (New)	NI	NI	NI
TOTALS	571	11,194	12,459
TOTAL NUMBER OF RESPONSES	42	42	42

*Incomplete data
ND - park not developed yet
NI - no information provided

Table 4.2

TOTAL ASSESSED VALUE AND TAXES PAID FOR NEW BRUNSWICK INDUSTRIAL PARKS

PARK NAME	ASSESSED VALUE	TAXES PAID
1. Atholville Industrial Park	$ 24,400.00*	$ 604.00*
2. Bas Caraquet Industrial Park	1,502,800.00	61,786.00
3. Bathurst Forest Complex	NI	NI
4. Bathurst Industrial Park	6,468,700.00	279,392.00
5. Belledune Industrial Park	ND	ND
6. Beresford Industrial Park	367,200.00	14,885.00
7. Bouctouche Industrial Park	49,900.00*	1,818.00
8. Campbellton Industrial Site	NI	NI
9. Caraquet Industrial Park	407,200.00	16,233.00
10. Caledonia Industrial Estates	13,756,600.00	607,065.00
11. Chipman Industrial Park	NI	NI
12. Champlain Industrial Park	4,455,500.00	144,318.00
13. Chatham Industrial Park	3,241,900.00	134,344.00
14. Clair Industrial Park	1,116,500.00*	36,409.00*
15. Dieppe Industrial Park	24,790,600.00	1,001,199.00
16. Fredericton Industrial Park	25,909,500.00	989,420.00
17. Fundy Aquaculture Park	NI	NI
18. Grand Falls Industrial Park	2,036,700.00	78,671.00
19. Grandview Industrial Park	15,880,400.00	736,851.00
20. Hartland Industrial Park	4,014,100.00	165,163.00
21. Lameque Industrial Site	NI	NI
22. Lorneville Industrial Area	46,396,800.00	2,152,811.00
23. Madawaska Industrial Park	NI	NI
24. McAdam Industrial Park	260,800.00	8,435.00
25. McAllister Industrial Park	4,452,800.00	206,610.00
26. Minto Industrial Park	1,861,400.00	70,919.00
27. Miramichi Industrial Park	4,334,600.00	175,839.00
28. Moncton Industrial Park	59,856,300.00	2,641,320.00
29. Nackawic Industrial Park	18,927,900.00	743,488.00
30. Nashwaaksis Industrial Park	ND	ND
31. Oromocto West	NI	NI
32. Oromocto East Industrial Park	NI	NI
33. Petit Rocher Industrial Park	313,900.00	12,641.00

*Incomplete data
NI - no information provided
ND - park not yet developed

Table 4.2

TOTAL ASSESSED VALUE AND TAXES PAID FOR NEW BRUNSWICK INDUSTRIAL PARKS (Cont'd)

PARK NAME	ASSESSED VALUE	TAXES PAID
34. Perth Andover Industrial Park	600.00*	14.00*
35. Republic Industrial Park	2,535,800.00	100,192.00
36. Restigouche Industrial Park	807,000.00	30,986.00
37. Rexton-Richibucto Industrial Park	347,700.00	14,242.00
38. Sackville Industrial Park	NI	NI
39. Scoudouc Industrial Park	9,609,800.00	230,772.00
40. Shippagan Industrial Park	22,000.00	922.00
41. Spruce Lake Industrial Park	7,798,800.00	361,864.00
42. St. Jacques Industrial Park	1,366,500.00	45,774.00
43. St. Leonard Industrial Park	548,200.00	21,961.00
44. St. Stephen Industrial Park	4,986,700.00	209,965.00
45. Sussex Industrial Park	5,630,900.00	218,699.00
46. Tracadie Industrial Park	54,400.00	1,380.00
47. Vanier Industrial Park	6,236,700.00	249,335.00
48. Victory Industrial Center	NI	NI
49. Westmorland Chemical Park	1,200.00*	29.00*
50. Woodstock Industrial Park (Old)	1,831,500.00	66,216.00
51. Woodstock Industrial Park (New)	NI	NI
TOTALS	$282,204,300.00	$11,832,572.00

38 Responses

*Study Team estimates based on incomplete data.
NI - no information provided
ND - park not yet developed

Category of Benefit	# of Responses
Employment of population	7
Improved quality of life	5
Centralization of industrial activities	5
Development of community	4
Improved schools & education opportunities	4
Infrastructure improvements enabled	3
Other	4

Typical attitudes seemed to indicate that the parks, by providing a centralization of industrial activities, makes the community a better place to live. As a spinoff from the economic activity in the parks, the quality of life improves not only from a reduction in the number of industrial plants located on major streets or the downtown area, but also because the increased tax base enables better community facilities like schools and recreational/cultural facilities to be constructed and maintained.

Environmental Benefits - A total of 17 questionnaires provided the type of environmental benefits which park officials attributed to their parks. Their responses may be summarized as follows:

Category of Benefit	# of Responses
A more controlled environment	11
Central location for industry	3
More serviced areas (water & sewer)	3
Improved community aesthetics	1

Illustrative of the answers was that the relocation of certain industries from residential areas was good for aesthetics, and also good for the environment as more effective water and sewage systems are installed in the parks.

Other Benefits - A total of nine questionnaires indicated other related benefits such as the following:

> "Our industrial park has certainly put us on the map. This trend will continue for many years into the future"
>
> "Park reduces truck traffic in the city"
>
> "Residential development improves when not mixed with industry."

4.4.2 Review of Two Industrial Parks

In order to complement the information on general benefits of the parks, a more detailed analysis was attempted which examined the benefits and costs associated with two relatively successful

parks in the Province - the Bathurst Industrial Park and the Moncton Industrial Park. In each case it was difficult to get reliable cost data since parks were funded by three levels of government under a variety of programs. It was especially difficult to get cost data for the Moncton Park since it commenced in 1960, and a review of files provided incomplete data which was at best confusing and sometimes inconsistent. Moreover, it was sometimes not possible to ascertain total expenditures versus the individual shares of Municipal-Provincial, Municipal-Federal and Federal-Provincial cost-sharing arrangements and in some years consultant estimates for costs were found, but then could not be confirmed with actual expenditures. However, the records found are considered useful with which to illustrate a comparison of benefits and costs at these two parks.

4.4.2.1 Bathurst Industrial Park - This park was established in 1972 with funds mostly from the FRED agreement initially, but subsequently from GDA sources. Once the Chaleur Regional Development Commission was created, ownership of the park was turned over to that organization in 1973. Over the 1972-1990 period a total of $1.5 million was invested in the park by the federal, provincial and municipal governments (See **Table 4.3**). When converted to 1990 dollars[1], the total estimated expenditures by the three levels of government over the 18 year period, if all spent today, would be approximately $3.2 million dollars.

With regard to benefits, an attempt was made to identify the direct revenues which accrued to the three levels of government during 1990. These revenues accrued from property taxes,land sales, personal income taxes paid by persons employed at the park, and corporate income taxes paid on profits by the businesses located in the park.

Property Taxes - In 1990 the 16 firms located in the park had a total assessment of $6.9 million dollars on which they paid taxes of approximately $279,400.

Land Sales - The park charges a price of $18,000 per acre for property sold in the park. Based on recent annual sales of eight acres per year, 1990 revenues of $144,000 from land sales are estimated.

Personal Income Taxes - A total of 387 persons are currently employed in the park. Assuming they earn the average income of all Bathurst residents ($19,800)[2] and pay the same level of income taxes (28%), the total payroll for persons employed in the park would be about $7.7 million and the federal and provincial taxes paid would be approximately $2,146,000.

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[1] Using the Saint John, N.B. consumer price index.

[2] Financial Post, Canada Markets 1990.

Table 4.3

ESTIMATED COSTS OF BATHURST INDUSTRIAL PARK ($)

Year	Federal	Provincial	Municipal	Estimated Cost
1972	$ 92,455	$ 97,186	$ 87,852	$ 277,493
1974	64,000	64,000	–	128,000
1975	80,000	20,000	–	100,000
1976-81[1]	286,922	191,281	–	478,203
1982-83[1]	132,879	88,586	–	221,465
1990[2]	87,500	37,500	159,100	284,100
Total	$743,756	$498,553	$246,952	$1,489,261
		Total in 1990 $		$3,172,153

[1]Assumes 60% federal - 40% provincial cost-sharing.

[2]Assumes 70% federal - 40% provincial cost-sharing.

Corporate Income Taxes - It is conservatively estimated that the total value of the output of all firms located in the park can be assumed to be a factor of 1.59 times payroll.[3] This implies total annual sales by the 16 firms located in the park of $12.2 million. It is further assumed that these companies enjoy an average ten percent profit margin and pay corporate income taxes at a rate of 35 percent of these profits. Based on these assumptions it is estimated that the companies in the Bathurst park collectively contribute annual corporate income tax payments of $430,000.

A summary of the total annual revenues that accrue to the municipal, provincial and federal governments from land sales and taxes is provided in **Table 4.4**. It is estimated that the three levels of government collectively realize total annual revenues of $2,999,400 from taxes paid by park tenants and their employees, and land sales.

Comparing the costs and revenues, it can be seen that the total costs invested in the park over 18 years is approximately $1.5 million whereas in a single year (1990) the three levels of government realized total revenues of approximately $3.0 million, and these revenues are realized every year! If one converts the costs incurred between 1972-1990 all to 1990 dollars as an estimate of what the development costs might be today, the $1.5 million cost becomes approximately $3.2 million dollars (1990). Even at today's development cost, the public sector's investment would almost pay for itself in one year. Obviously if one added to the revenues, the prior land sales, property tax and income tax revenue realized between 1972-1989 and converted them to 1990 dollars, the infrastructure investments would certainly look like a sound investment indeed.

4.4.2.2 Moncton Industrial Park - This park commenced in 1960 when the Province expropriated 500 acres of land at a cost of approximately $1.5 million cost-shared equally with the City. Over the years further assistance was made available, principally under the GDA agreement. To date we have not been able to obtain satisfactory data for the development costs of this park since files prior to 1970 are not readily accessible, and no recent comprehensive cost summaries were available. Based on the limited data the Study Team was able to assemble, **Table 4.5** presents a summary of the estimated total costs invested in the Moncton Industrial Park between 1960-1990. With the inclusion of the $7 million debt write-off by the Province in 1985, the total costs over the thirty year period are estimated to be $10.0 million. When converted to 1990 dollars, the total costs are estimated to be approximately $20.5 million.[4]

Although the Study Team is concerned that the development costs are incomplete, particularly for expenditures by the municipality in developing the park between 1961 and 1977, we believe that

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[3] Statistics Canada; Aggregate Producing Measures, 1988 Catalogue #15-204 Annual. Value of Labour productivity for business sector, excluding Agriculture.

[4] Based on the Consumer Price Index.

Table 4.4

ESTIMATED DIRECT ANNUAL REVENUES (BENEFITS) TO GOVERNMENT FROM BATHURST INDUSTRIAL PARK

Category of Benefits	Annual Revenue $
Property Taxes	$ 279,400
Land Sales	144,000
Personal Income Tax	2,146,000
Corporate Income Tax	430,000
Total	$2,999,400

Table 4.5

ESTIMATED COSTS OF MONCTON INDUSTRIAL PARK (1960 - 1990)[1]

Year	Activity	Estimated Cost
1960	Land Purchase and assembly by Expropriation	$ 1,477,000
1977-78	Roughyard (GDA Cost-Sharing 80% - 20%)	21,000
	Hydro, Sewer, Water, Rail Services (50% grant, 50% Loan)	1,193,000
	Rail Extension (GDA Cost-Sharing 80% - 20%)	100,000
1981-82	Storm Sewers - Rooney Crescent	247,000
1985	Province writes-off debt of M.I.D. and assumes park ownership	7,000,000
	Total	$10,038,000
	Total in 1990 $	$20,546,000

[1]Study Team estimates based on incomplete data.

the inclusion of the $7 million debt write-off in 1985 compensates for the missing data. Essentially this $7 million debt write-off represented the approximate costs (including property taxes) plus interest which Moncton Industrial Development Ltd. owed to that point in time as a result of park development costs. Thus it likely covers the major part of missing costs on the Moncton Industrial Park since some of this debt resulted from development of the Caledonia Industrial Estates park as well.

On the benefit side, as in the case of the Bathurst park, an attempt was made to identify the direct revenue which accrued to the three levels of government during 1990. Once again, the revenues estimated included property taxes, land sales, personal income taxes paid by persons employed at the park, and corporate income taxes paid on profits by the business located in the park.

Property Taxes - In 1990 the 94 firms located in the park had a property assessment of $59.9 million dollars on which they paid taxes of approximately $2,641,000.

Land Sales - The park charges a price of $22,000 per acre for property sold in the park. Based on average sales of 15 acres per year, annual revenues of $330,000 are estimated.

Personal Income Taxes - A total of 2953 persons are employed in the businesses located in the park. Assuming they earn the average income of all Moncton area tax payers ($20,311)[5] and pay income taxes at the average level for the area (25 percent), the total payroll for persons employed in the park is about $60.0 million dollars and the personal income taxes paid is estimated to be $14,995,000.

Corporate Income Taxes - It is conservatively estimated that the total value of the output of all firms located in the park can be assumed to be a factor of 1.59 times the payroll of all these firms.[6] It is further assumed that these companies enjoy an average ten percent profit margin and pay corporate income taxes at a rate of 35 percent of their profits. Based on these assumptions, it is estimated that the companies in the Moncton Industrial Park collectively contribute annual corporate income tax payments of $3,338,000.

A summary of the total annual revenues which accrue to the municipal, provincial, and the federal government is provided in Table 4.6. It is estimated that the three levels of government collectively realize total annual revenues of $21.3 million from taxes paid by park tenants and their employees, and land sales.

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[5] Financial Post; Canada Markets 1990.

[6] Statistics Canada; Aggregate Productivity Measures, 1988 Catalogue # 15-204 Annual. Value of labour productivity for business sector, excluding Agriculture.

Table 4.6

ESTIMATED DIRECT ANNUAL REVENUES (BENEFITS) TO GOVERNMENT FROM MONCTON INDUSTRIAL PARK

Category of Benefits	Annual Revenue $
Property Taxes	$ 2,641,000
Land Sales	330,000
Personal Income Tax	14,995,000
Corporate Income Tax	3,338,000
Total	$21,304,000

Comparing the costs and revenues, it can be seen that the total cost invested in the park over 30 years is approximately $10.0 million, whereas in a single year (1990) the three levels of government realized total revenues of approximately $21.3 million dollars. If one converts the costs incurred between 1960-1990 all to 1990 dollars as an estimate of what the development costs might be today, the $10.0 million cost becomes approximately $20.5 million dollars. (1990$). As a confirmation of the estimated cost in 1990 dollars of $20.5 million, for the approximately 600 acres of serviced land in the Moncton Industrial Park, the resultant land development cost per acre would be $34,243, which compares closely to the average cost per acre calculated from questionnaire responses.

These costs and revenue estimates suggest that even at the level of today's land development costs, the total public sector's investment in Moncton Industrial Park over a 30 year period would be more than repaid within a year, with revenues of $21.3 million estimated in 1990 alone and total development costs of $20.5 million (1990$) incurred over the thirty year period 1960-1990.

As in the case of the Bathurst Industrial Park, if one added to the revenues the gradual buildup of property taxes, land sales revenues, and income tax revenues realized from park businesses between 1960-1990 and converted them to 1990 dollars, the revenues would dramatically exceed the public sector investment.

4.4.2.3 Summary

The comparison of public sector costs and revenues associated with the Bathurst and Moncton Industrial parks serve to highlight the tremendous net benefit realized collectively by the three levels of government as a result of the industrial parks, their tenant businesses, and the employees of these companies. No attempt has been made to quantify the extent of the spinoff benefits from subsequent rounds of spending by park employees, nor have the additional costs been quantified of increased fire protection and other services necessitated because of the businesses located in the parks. Obviously both these indirect benefits and costs would be substantial over the years.

Some may argue that many of the companies located in the parks would be resident in the province without the parks and so would generate these benefits anyway. This is only partly true since many of the companies located in the Moncton Park would likely have chosen the Burnside Park in Dartmouth or some other major industrial park in another province, if New Brunswick did not have suitable industrial parks.

The fundamental point that has to be understood is that industrial parks are extremely important since the resident companies form a vital component of the provincial economy. The government must recognize that the companies located in the parks are an established fact and should not be taken for granted. Although all levels of government may find it difficult to allocate the large

sums of money required to upgrade the infrastructure in the parks, the comparison of costs and revenues reveals clearly that these costs are small in relation to the direct revenues that companies in the parks and their employees provide, chiefly in the form of tax revenues.

5.0 EXPERIENCE ELSEWHERE

To assist in preparation of policy recommendations, the Study Team investigated the experience of park operations in other areas. To obtain another view of the overall management and development of industrial parks at the provincial level an inquiry was made into the Nova Scotia experience. Interviews were conducted with two senior government officials to elicit their opinions on the strengths and weaknesses of their park system.

The research also investigated the operation of what is recognized as the most successful industrial park in the Atlantic Provinces. This detailed review of Dartmouth's Burnside Industrial Park was designed to highlight the way it has achieved its success.

To obtain another perspective, the Study Team looked to Bangor, Maine which has been successful in developing and operating industrial parks for regional benefits. The Bangor system of industrial parks is centred around the Bangor International Airport and has created some 6400 jobs in the region.

The following subsections review these parks and highlight those points of importance to the development of industrial parks in New Brunswick.

5.1 The Nova Scotia Experience

It was felt that it would be advantageous to examine the Nova Scotia situation with regard to government policies toward industrial parks. To achieve this objective interviews were held with two key provincial officials; the Director of Industrial Parks and Properties for the Nova Scotia Department of Small Business Development, and the Supervisor of Projects for the Department of Industry Trade and Technology, Technical Services Branch. The subsections which follow include the comments and responses of these two informants to questions about the development and operation of the parks.

5.1.1 Park Ownership

In Nova Scotia 53 sites are designated as Industrial Parks, however, as in New Brunswick a number of the sites are little more that land zoned for industrial use. The ownership of the parks is also similar to that found in New Brunswick in so far as it is almost entirely in the public sector.

The Nova Scotia Government, through a Crown Corporation, the Nova Scotia Business Capital Corporation holds title to 18 of the sites. Of these, two are single large industry sites - the Glace Bay Heavy Water Plant Site and The Point Tupper Gulf Oil Refinery Site - and two are awaiting their initial tenants - Sheet Harbour and Musquodoboit Harbour. The Provincial Government also

owns 19 industrial malls which are dispersed across the province, mostly in previously existing industrial parks.

Of the other 33 sites one - Sydport - is owned by a federal Crown Corporation, the Cape Breton Development Corporation, and one - Milford - is privately owned, with the ownership of the rest held by County governments, Municipalities or Economic Development Commissions.[1] The precise division of ownership between the last three was not made available to the Study Team but an initial investigation reveals that five of the sites represent little more than land zoned for parks and that only 16 are listed as having tenants in 1989.

The two contacts had differing opinions on who should own the parks. One was of the opinion that ownership by municipalities should be encouraged. He felt that there is a need for local initiative and local involvement since Municipalities have the most to gain by having a successful park. The other contact was of the view that the position of the Commissions should be strengthened as much as possible. Where there is a choice between municipal and commission ownership he favours commission ownership stating, "They are less political, more business like, they work quickly and are able to make the tough decisions."

5.1.2 Land Sales

That the sale of land by a provincial government department is a slow and detailed process requiring cabinet approval, was recognized by the Nova Scotia Government as a hinderance to the attraction of business to the provincially owned industrial parks. It was to mitigate this problem that they established the Nova Scotia Business Capital Corporation as the owner of the provincially owned industrial park lands. The crown corporation is able to sell the land without recourse to cabinet and thereby effectively reduce delays to meet the demands of potential land purchasers. Municipalities, counties and commissions are responsible for land sales in the parks that they own.

Realtors are used by the public sector owners to attract businesses to their parks. The major use of realtors is to find buyers for vacant buildings in the industrial parks. They are used to a lessor extent for selling land within the parks. The fee paid to the realtor is five percent of the sale price, consequently where land prices are very low there is little incentive for the realtor to promote the sale of park land.

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[1] Economic Development Commissions - There are approximately 20 Commissions in Nova Scotia. They range from active regional commissions to those representing only two or three municipalities. They may own industrial parks in their name or they may administer and/or promote parks for their member municipalities. The Province and the member municipalities are represented on the Commission with the Province sitting as ex-officio member. Commissions are funded by member municipalities and also receive grants from the province. The annual provincial budget for the Commissions is presently established at $485,000.

Both contacts indicated that, presently, the price of land is essentially a promotional tool used to attract tenants to a park. It was felt that the price of land should be tied to the tax rate of municipalities. The province has over the years created a climate of selling industrial land cheap, now it is hard to increase the price to reflect the actual development costs.

One of the contacts felt that in order for Commissions to be effective, they need to have the ability to sell and buy assets. Also they need to have some financial responsibilities for without this, their usefulness is diluted.

Generally, both felt the price at which industrial park land is currently sold, is too low.

5.1.3 Funding

The Province funds infrastructure projects for industrial parks operated by the counties, municipalities, and commissions. As a rule of thumb, parks are funded on a 50/50 basis, between the province and the park owner. It is felt that if funding support can be obtained from the county, municipalities or commissions they will take a more active role in the park and this will add to its potential for success.

Where a county, municipality or commission was not able to contribute 50 percent of the cost of a project the province has in the past contributed more. Even if the owner could only commit 20 percent toward the overall cost, this showed they were in favour of the parks development and required them to be politically supportive of it. Before the Province grants funding, the Department of Municipal Affairs is consulted as to the financial situation of the municipality requesting the funding.

Both contacts strongly supported the idea of having all the funds from land sales returned to the park owner. The revenue from land sales should be reinvested in the park for such things as park promotion, administration, land acquisitions and infrastructure.

5.1.4 Park Promotion

The owner of the park is responsible for park promotion. The province is responsible for maintaining an updated information base on the parks that they own, however, they feel that they do not have the staff available to maintain up-to-date information. Their information base allows them to monitor changes in their parks and they are able to make policy decisions using this information. They have an industrial park inventory of all of the parks, detailing the size, price per acre and a brief description of the park (ie. high visibility, industrial/commercial, fully serviced, graded). It is somewhat behind schedule at the present time.

A municipality or county, as park owner, may cede this responsibility to an Economic Development Commission and in turn for contributing funds to the Commission will sit on its Board of Directors. The Province also provides funds, in the form of a grant, to Commissions for park promotion such as - production of brochures, attendance at trade shows and the like. Grants for promotion are not fixed, but maximums have been established. The maximum grant to a Commission with a single industrial park is $25,000, for more than one park the maximum is $50,000.

Since the province partially funds the commissions, they are able to sit on the committee of the commissions, along with participating municipalities, as an ex-officio member. This in the opinion of the two contacts leads to a more standardized approach to promotion across the province. They also felt Parks generally could be more successful if the region was promoted as a whole, rather than by single municipalities. This would help to avoid competition between municipalities. Competition tends to scare the potential investor. Municipalities should work together to improve the region, benefits can then be spread out to all municipalities within a region.

5.1.5 Development Outside of Parks

As in New Brunswick, industrial development outside of industrial park boundaries is a concern in Nova Scotia. Land costs and taxes are generally lower in areas outside of municipalities and, as a result, developers often locate industrial development there. The implications of this type of development are mitigated to a degree, as all of Nova Scotia is incorporated and most areas have basic land use plans in place.

It was felt by one of the contact persons that the success of a park can be related directly to the zoning in the area in which it is located. In some areas, the by-laws will not permit backyard operations, thus the industrial park is more successful since these entrepreneurs have to locate in an industrial park. In those areas without such a zoning by-law affecting backyard operations, the park may be less successful as a result.

The officials both expressed the opinion that industrial development should be encouraged to locate in an industrial park and only under very specific circumstances should a project be supported outside of a park. For example, activities such as a fish processing plant are dependent on being in close proximity to its source of fish. Thus it may not be appropriate from a business point of view to force such a plant into an industrial park that is distant from a wharf.

5.1.6 By-Laws, Covenants and Regulations

Most parks are covered by some type of regulations, by-laws, or covenants. These are general provincial guidelines for the parks relating to road widths, setbacks and building standards, and if

the park is located within a municipality, all development within the park must satisfy those by-laws and zoning regulations.

As in New Brunswick they are followed to varying degrees. For example, if a park has a covenant that requires construction to be completed in six months and the developer cannot meet this deadline, rather than lose a tenant the covenant will be waived.

5.1.7 Other Comments

When asked about the desirability of establishing zoning within industrial parks (ie. heavy industrial, light industrial, service, etc.) the responses were that parks should not be limited to specific types of industry, there can be an appropriate mix of industries. However, caution should be exercised about allowing or encouraging retail operations to locate in the park. Industrial land is heavily subsidized (ie. land price is not reflective of the development cost) and if retail operations locate in the park it may be detrimental to other areas of the municipality.

One of the officials expressed the opinion that promoters and municipalities want full water and sewer service to attract tenants, whereas industries are not as concerned about services. If an area is unserviced, the price of land is usually lower, thus the developer can purchase a larger lot and install private services to meet the particular needs of the industry. This official felt that industries should be encouraged to provide their own services, as this would lessen the financial strain on the municipalities to provide expensive services where private systems may be adequate.

On the subject of attracting tenants to a park the two officials agreed that location was the most important factor. Associated with location was good access to the road network, as more and more products and materials are being moved by truck.

Other considerations included the tax rate, availability of a workforce, and the potential for linkages with other established industry in the region in which the park is located.

Finally, when asked about measuring the performance of industrial parks the contacts felt that this was a relative issue depending on who owns the park. If it is a provincial park, success would be measured by the number of lots sold, regardless of the use. Increases in employment and tax assessment are also important. A municipality or a commission may on the other hand measure the success of the park in the traditional way, based on increases in the tax base, employment and diversification of the economy.

5.1.8 Summary

The ownership of industrial parks in Nova Scotia is comparable to that of New Brunswick. The administration and promotion of the parks, however, appears to lie more in the hands of the Economic Development Commissions in Nova Scotia than it does in the hands of the Regional Development Commissions in New Brunswick.

In both provinces the responsibility for land sales lie with the owner of the park unless the responsibility is ceded to a commission.

Nova Scotia has a 50/50 rule of thumb for funding industrial park expansion and infrastructure costs. In addition it has an annual budget of $485,000 to assist with the promotion of the parks. There was some indication, however, that due to political clout certain commissions receive more than their share of the funding.

In both provinces there is a voiced concern that development outside park boundaries inhibits growth and usefulness of a park. This is somewhat mitigated in Nova Scotia since all the province is incorporated and most areas have land use plans in place.

In Nova Scotia it appears that most parks are covered by by-laws, covenants and/or regulations. This too is the result of the province-wide incorporation of rural areas.

The Province of Nova Scotia maintains an industrial park data base. Although not up-to-date due to lack of staffing, it provides a solid basis by which to evaluate parks on a common base.

5.2 Burnside

It was recommended by the Steering Committee that the Burnside Industrial Park in Dartmouth, Nova Scotia be examined since it is generally considered the most successful industrial park in Atlantic Canada.

Burnside was established in 1969 and has grown to a community of over 1,200 businesses, with a combined total workforce of 15,000. The park includes more than 2,000 acres of land. In recent years the park has been enjoying a steady growth rate of over 50 new corporate entrants per year. These 1,200 companies represent the largest concentration of light manufacturing, warehousing and distribution, sales and service and professional service companies in Atlantic Canada.

The City of Dartmouth is the developer and manager of the park. In the last three years alone, over $20 million has been invested in the park to service commercial and industrial building lots, improve existing infrastructure and expand the street and highway system. Darmouth and the

Province of Nova Scotia have committed more than $60 million over the next five years to existing and planned infrastructure for the park. The Province of Nova Scotia has committed an additional $15 million to the extension of the #107 by-pass, which provides one of the main accesses into the park, and the #118 highway to Akerley Boulevard, which is one of the main arterials of the park. These highway extensions are scheduled for completion in 1992.

5.2.1 Pricing Policy

Land prices are established to recover the direct costs of development including clearing, grading, water transmission, sanitary and storm watermains, street construction, landscaping and signage. Where lots are not graded, the price is reduced. Similarly, lots on major streets, which enjoy enhanced exposure and access, are priced in relation to their greater market value.

The range in price of land is dramatic. In June 1990 the lowest price per square foot was $1.25 ($54,450 per acre) and the highest was $7.00 per square foot ($304,920 per acre). The least expensive lot available at that time was located on a cul-de-sac and had a price tag of $30,900 for just under one-quarter acres ($2.95 per sq.ft.) while the most expensive lot had a sales price of $939,806 for just over three acres ($7.00 per sq.ft.)

5.2.2 Lot Sizes and Subdivisions

Lots are available in sizes ranging from one-fifth of an acre (9,300 sq. ft.) to four and five acres (174,000 to 217,800 sq. ft.) and larger. In most cases the lots are designed and laid out so that they can be further subdivided and modified to meet a company's specific requirements.

Burnside has seen and has met the demand for smaller lots by small and medium size businesses. It has established a new development comprising of lots ranging in size from 12,524 sq. ft. to 93,150 sq. ft. These lots have been specially designed for ease of subdivision to meet the diverse requirements of small and medium size businesses.

5.2.3 Reinvestment of Revenues

The City of Dartmouth does not make a direct profit on the sale of lots in Burnside. The City's role in the development of the Park is: to provide business with a quality facility in which to locate, to support job creation and retention; and, to expand the non-residential assessment base.

All revenues from the sale of lots are reinvested in the Park to service additional lots and to improve existing infrastructure and services. This policy of cost recovery and reinvestment of revenues ensures the continued growth and success of the Park.

5.2.4 Development Controls

To ensure that the high visual quality of the park is maintained, the City requires every potential developer to complete a detailed Site Development Proposal application. This detailed application ensures that before the land is sold potential developers are financially sound and aware of the standards they must meet. The following is a sample of the types of information that the City requests in the Site Development Proposal:

- Method of financing (site and proposed building construction.)

  Personal Cash Equity _____
  Corporate Cash Equity _____
  Mortgaged Property _____
  Government Contribution _____
  (grant, guarantee, loan)

- Type of Development Proposal

  a). Sites in Burnside Industrial Park are sold for development purposes only as approved by the Dartmouth Industrial Commission

  Multiple Tenancy Development _____
  Manufacturing Facility _____
  Warehousing & Distribution Facility _____
  Sales and Service Facility _____
  Office Building _____
  Other _____

  b). Describe the type of operation(s) that will be conducted within the proposed facility and on the balance of the site.

- The Building

  a). Type of building materials and building exterior.

  Vinyl Cladding and Brick Exterior _____
  Pre-Engineering Steel Cladding and Brick Exterior _____
  Brick Exterior Only _____
  Brick and Glass Panels Exterior _____
  Pre-Cast Concrete Exterior _____
  Pre-Cast Concrete and Glass Panels Exterior _____
  Other _____

  b). Size and Allocation of Space

  - Total size of proposed building _____ sq. ft.
    Total area of site being purchased _____ sq. ft.
  - Site of proposed building as a percentage of area of site ___%
  - Allocation of space within building

	Size in Sq. Ft.	Area %
Office Space	_____	_____
Manufacturing Space	_____	_____
Warehousing Space	_____	_____

Retail Space	_____	_____
Unallocated Space in Multiple Tenancy Building	_____	_____
Not Allocated Above	_____	_____
Other	_____	_____

o Landscaping

Burnside puts a great deal of emphasis on landscaping and maintaining a pleasant working environment. Companies locating in Burnside are required to meet the following provisions:

a). Complete landscaping details are to be shown on the site plan.

b). Landscaping is to extend from the curb of the street and is to include all areas of the site which are not covered by building, paving or gravelled areas at the rear of the building(s).

c). Front and side slopes of sites are to be landscaped.

d). Landscaping is to include a combination of sodding, trees, hedges and flower beds and selective cutting and pruning of any natural topography of the site. Sodding by itself is not acceptable as a minimum of landscaping treatment.

e). The value of landscaping treatment, excluding paving and curbing is not to be less than two percent of the developed value of the site. For example, if the value of site complete with finished buildings, paved driveway, parking areas and fenced storage is $2,000,000, the value of the landscaping treatment is to be no less than $40,000.

o Development Timetable

Information is required on the time period necessary to complete the entire construction. This includes the building, curbing and hard surfacing, landscaping and fencing. All work must be completed within 24 months after closing the land sale.

o Economic Impact

The potential purchaser is asked a series of questions on the economic implications of his/her proposed operation.

a) Indicate whether the proposed development is:

New Business Operation or Facility	_____
Relocation and Expansion	_____
Relocation Only	_____
Expansion Only	_____

b) Indicate the number of employees to be employed by or added to the company payroll:

Full-Time Employees _____
Part-Time Employees _____

c) Anticipated market area of the proposed development:

	%
Burnside	___
Dartmouth	___
Metro Area	___
Other Nova Scotia	___

Atlantic Canada	___
Other Canada	___
United States	___
Export	___

The Site Development Proposal is reviewed by the Dartmouth Industrial Commission. The Dartmouth Industrial Commission reserves the unqualified right, at its own discretion, to accept or reject a Site Development Proposal.

o Terms and Conditions

The City of Dartmouth has a list of 25 Terms and Conditions of Purchase and Sale, that have to be met in order to purchase land in Burnside. A sample of four of the Terms and Conditions imposed are provided below.

> A purchase option is available for one year from the date of approval of the Site Development Proposal by the Industrial Commission for a fee of 30 percent of the purchase price of the site.
>
> The purchaser covenants to initiate development as set out in the Site Development Proposal not later than twelve (12) months after the date of closing and to complete its construction not later than twenty-four months after closing.
>
> As part of the Site Development Proposal, the purchaser agrees to submit a deposit in the form of a certified cheque in the amount of ten percent of the purchase price of the site.
>
> The Commission is paid at the time the land transaction is closed, the deed is conveyed and the City receives the balance of the purchase price on the lot. The Commission is to be paid five percent of the purchase price of the site.

Promotion

The City of Dartmouth has an Economic Development Department which is responsible for administration and promotion of Burnside Industrial Park. The Province does not provide funding for the promotion of Burnside. According to park officials, a park like Burnside does not have to do a lot of promotion. Essentially the park promotes itself.

5.2.5 Summary

Burnside Industrial Park is the exception rather than the norm. With 1200 resident businesses employing 15,000 persons it is larger than the business sectors of most New Brunswick

communities. Burnside is justifiably referred to as "A Business Community". In addition to its manufacturing industries, the list of business and personal services offered in the park resemble those that are offered by a town. The business services offered include seven national/international banking institutions; 30 transport companies; real estate, accounting and law firms; corporate meeting centres; data systems and computer organizations; graphic designers; and commercial printers.

Like any community, Burnside offers a number of amenities to the 15,000 people who work there. The personal services include access to the metropolitan transit system; day care facilities; retail shopping; indoor recreational facilities, outdoor recreational areas with walking paths and jogging trails; restaurants, pubs and lounges; and soon, an upper scale hotel complex.

Land prices ranging from $54,000 to $305,000 per acre, are designed to recover all direct costs with all revenues scheduled for reinvestment in the Park. At the same time pricing of lots reflects the market demand in terms of the visibility of the site, the site preparation costs and availability of other amenities. A variety of lot sizes available to meet the needs of specific clients, are designed into the initial layout of streets and services, but development controls are rigidly enforced to ensure the visual integrity of the Park.

While no longer needing any degree of designated promotion, the park offers an inventory of approximately 100 serviced acres, ranging in size from 9,300 sq. ft. and up, that are available for immediate sale and development. The park also has a comprehensive high quality promotional brochure and information package which is provided to prospective tenants.

Burnside is proof that nothing succeeds like success. It is the measuring stick to which all industrial parks in this region are compared to. It is the park that all others in the region try to emulate and pale in comparison.

5.3 Bangor Industrial Parks[2]

The City of Bangor is the principal commercial centre in eastern Maine. Residents however claim their isolation from mainstream of U.S. industrial activities is at least as severe as New Brunswickers feel their separation from central Canada. With this common appreciation of distance from an industrial heartland, the Study Team felt that the approach taken in the Bangor Area to the development and population of industrial parks was of value in New Brunswick. It should be noted that the City of Bangor has a population of only 34,000, although it serves a primary market area, (20 mile radius) of 100,000 persons.

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[2] Based on a visit to the parks and discussions with Mr. Kenneth Gibb, Director, Department of Community and Economic Development, and Mr. Edward McKeon, Executive Director, Bangor Target Area Development Corporation.

In the Bangor area a system of 14 industrial parks comprising approximately 1,000 acres of land, all within a 12-mile radius of the Bangor International Airport, has been established. Today, approximately 200 companies employing approximately 6,400 workers operate in these parks. The parks are environmentally approved, properly planned, fully serviced by utilities, and price controlled (Lots sell for $10,000 to $35,000 per acre, depending on size of purchase). Some of the parks were developed by the City of Bangor, others by a non-profit private development corporation, and some by the private sector. A summary of the recent status of each of the parks follows.

5.3.1 The Parks

o Bangor International Industrial/Business Airpark

This is a 186-acre portion of Bangor International Airport located on the northeasterly side of the facility's two-mile long runway, and comprising several subdivisions for business, office, industrial and air-oriented uses. The area is fronted by Union Street, a major city business street of shopping centres and restaurants, within walking distance of the new $7 million air passenger terminal complex (domestic and international arrivals terminals and nine-story Hilton Hotel, all inter-connected). Located within one mile of two inter-state 95 interchanges, the park contains air cargo facilities and an international free trade zone.

All airport land is leased, with conditions and terms structured to accommodate and protect private financing of developments. Land costs range from a low of $2,000 per acre per year for job-generating basic industry, up to current appraised values for business parcels.

a) Industrial/Business Airpark (Griffin Rd & Maine Avenue)

This is a 87-acre subdivision for light industry, with business parcels fronting on Union Street. Parcels from one to thirteen acres in size are available. They are fully serviced by utilities; cleared, filled, generally level and ready for development. Manufacturing plants already operating include General Electric, and Anzac Electronics. The park has open zoning, with protective lease restrictions.

b) Union Plaza

A new business subdivision being prepared, fronting on Union Street and Godfrey Boulevard with high traffic volume, split in two sections, totalling 18 acres. Lots one acre and up soon to be available. Suitable for businesses requiring heavy traffic exposure.

c) Bangor Free Trade Zone #58

A 25-acre subdivision of lots in sizes two acres and up, all located within the restricted zone boundary, fully serviced and ready for development. The 'Zone Park' includes a light-duty aircraft parking ramp, with direct access for corporate aircraft to a taxiway and runway. Use within zone is restricted to industrial, processing, distribution firms requiring zone protection for import/export activities. The zone also offers a 22,000 square foot central processing building for receiving and shipping of goods, plus rental of processing and office space.

d) Maine Avenue Business/Industrial Incubation District

A 40-acre area along Main Avenue near the General Aviation air terminal and small aircraft tie down storage facilities. A highly attractive section, with spacious lawns, shade trees and parcels of one to five acres in size available, fully serviced, backed by the University of Maine college campus. The area abuts Interstate 95 and is one mile from the central business district. It is intended to attract corporate headquarters, bank offices, air-oriented, research and development and light industrial facilities. The area now contains corporate headquarters for Eastern Express Airlines, a major supermarket chain, the University of Maine state-wide administration office, and two research/ development firms.

e) Godfrey Boulevard Air Terminal Subdivision

A 16-acre subdivision located on the approach road (divided avenue) to the passenger terminal complex. Fully serviced lots one to five acres available within walking distance of passenger terminals and Hilton Hotel. Suitable for and restricted to uses supplementing the passenger service complex.

o Albert Area Industrial/International Freight Distribution Centre

A 90-acre area of Bangor International Airport at the southwest end of the runway, located a quarter of a mile from Interstate 95 intersection. The area comprises heavy-duty aircraft parking and storage ramps, sites for hangars, freight facilities and air-oriented industrial operations, all with direct access to the main runway. Lease only, with costs geared to industrial land leases.

- Bangor Industrial Park Annex

  A 131-acre industrial park composed of Farm Road and Perry Road in a lightly wooded area near the heart of the city, about 90 percent developed by about 50 firms. Some land available, fully serviced, ranging in size from 1.5 to 4 acres. Costs range from $10,000 to $20,000 per acre.

- Target Industrial Circle

  A 62-acre industrial park off Route 2, about 90 percent developed, designed for smaller buildings, rear lots having rail access. Fully serviced lots are available in sizes ranging from two to five acres. Costs range from $10,000 to $12,000 per acre.

- Dowd Industrial Park

  A new 45-acre industrial park off Odlin Road adjacent to Interstate 95, designed for large buildings. Lots from five to ten acres in size are available for sale, with price ranges from $12,000 to $20,000 per acre.

- Heritage Industrial Park

  An 110-acre privately owned industrial park, about 85 percent developed, with fully serviced lots available at negotiable prices. Site of major distribution plants, including Georgia-Pacific, National Biscuit Company, and others.

- Hildreth Street Industrial District

  An 160-acre district of major parcels of 60 and 80 acres in size, down to small acreage, for major industrial developments. Area is located off Route 2, west of Bangor International Airport. Privately owned, the site is intended for large light to heavy industrial uses. Site is 20 percent developed.

- Bomarc Industrial Park

  A 100-acre park located near Burleigh Road, utilizing a former military missile base, containing 40 former USAF buildings. Privately owned, fully serviced land sites are available for buildings at negotiated prices. Presently contains over 30 businesses and industries.

- Sylvan Road Industrial Park

  A 75-acre park, about 80 percent developed, adjacent to Interstate 95 and the Eastern Maine Vocational-Technical Institute Campus with about 15 acres still available. Presently occupied by GTE Sylvania and medical laboratory facilities. Included in city's first-class industrial zone. Privately owned. Price per acre negotiable.

- Banair Industrial Park

  A 43-acre industrial subdivision started in 1985 containing 20 parcels designed for small to medium size buildings. The site consists of airport land, presently leased, but negotiations are underway to make the land available for future sale.

5.3.2 The Growth Base

Two key factors which impacted on the success of the Bangor industrial parks are the lands made available adjacent to the Bangor International Airport, and the role of the Target Corporation. Approximately twenty years ago the federal government phased out the Dowd Air Force Base. Under terms of the National Airport Conveyance Act, approximately 2000 acres of the former site, including what is now the Bangor International Airport, were deeded to the city. Along with the transfer went numerous buildings which the city was able to use to attract major firms like General Electric, based on cheap rent. The former lands and buildings of the base formed the nucleus of a long term plan for the development of industrial and commercial parks.

As part of its Growth Centre Strategy, the City incorporated the Target Area Development Corporation in 1972 as a private, non-profit development corporation to undertake economic development projects in the Greater Bangor Region. Target has utilized its original capitalization (federal grant) and its earnings to undertake projects not fully pursued by private developers/investors. It has constructed four industrial-business parks, two industrial venture buildings, assisted in industrial financing and in a variety of other economic development and promotional projects.

The combination of a large expanse of flat, easily serviced land adjacent to the airport, the city business district, and Interstate 95, along with the dedicated professional staff of the Target Corporation, have been key ingredients in the success of the industrial-business parks in the Bangor area.

5.3.3 Lessons From Bangor Experience

- Influence of Environmental and Zoning Regulations - It appears that the environmental and zoning controls on Maine industry are considerably more stringent than in New Brunswick. Even small companies wishing to establish outside an industrial park are subject to an environmental review process which commonly takes a year. As well there is a site location law which frequently takes 8-9 months to get a site approved through the zoning process. By having the serviced lots in its industrial-business parks approved ahead of time and promoting them as "environmentally approved sites", the industrial parks have a strong selling tool.

- Independent Management - Park development and on-going management benefits from an organization like Target which has some autonomy from day to day municipal political influences, and a professional staff dedicated to industrial development.

- Regional Co-operation - Recognizing that regional interests are frequently impeded by neighbouring municipalities pursuing individual industrial development goals, Bangor area municipalities have recently undertaken a property tax sharing arrangement whereby participating communities share in the development costs and tax revenues resulting from the businesses established in "regional" industrial parks.

- Company Profile - Out of approximately 200 companies located in the Bangor area parks, only ten percent are true manufacturing/processing facilities. The city recognized the need early on for flexibility in tenant mix and now encourages wholesalers, industrial suppliers, transportation/warehouses/distributors, building contractors to selected areas of its parks. There is also high demand for small lots, particularly 1-1.5 acres in size.

- Speculation Buildings - Bangor's experience with erecting two large industrial buildings and then trying to attract suitable tenants is not rated as successful. One building sat vacant for a long period of time before a tenant was found. The other building has experienced two business closings, and is presently vacant.

- Promotion/Sales - Bangor officials attribute part of their success to the establishment of the Target Corporation. They feel that park development standards, promotion and sales should be handled by a semi-private organization which is not totally influenced by municipal politics. Although the City frowns on it, the Target Corporation favours use of private real estate agents who are only rewarded for their success in selling industrial park land and buildings and whose Clients can be controlled with effective zoning.

6.0 ADMINISTRATION/JURISDICTIONAL CONSIDERATIONS

This section reviews the ownership and administrative structures currently in place for the industrial parks and discusses the relative advantages and disadvantages typically associated with park ownership by each of the ownership categories.

The 51 industrial parks in New Brunswick are presently owned as follows:

- by the Department of Commerce and Technology -10
- by the Municipalities -28
- by the Regional Economic Development Commissions -12
- by private[1] -1

Current ownership of the individual parks is summarized graphically in Figure 6.1 and listed according to owner in Table 6.1.

6.1 Present Ownership/Administration

6.1.1 Private Sector Ownership

With few exceptions, private ownership of industrial parks in New Brunswick is limited to small industrial strip malls or small concentrations of industrial buildings erected on private lands frequently owned by the building contractor. Examples of these types of developments may be found outside the municipal boundaries of most of the cities in the province. Examples in the Fredericton Area may be found along the Hanwell and Richibucto Roads.

Two exceptions, are the Victory Industrial Centre, Moncton and the recent extension to the Fredericton Industrial Park.

The Victory Industrial Centre is an area of 100 acres (of which 90 acres are occupied) located in the western section of Moncton adjacent to the abandoned CN rail shops. The park is currently owned by Canadian National (CN) and is zoned for light industry. This park has evolved over time from a DND installation to a mixed use park. The sewage system for the park was installed by DND around the time of the Second World War.

The old DND buildings that remain on the site now house small to medium size retail, commercial and service sector activities. Other areas of the park accommodate such things as steel fabricating operations and a feed mill. Although zoned light industrial, there is a real mix of activities and, in the words of the park manager, the zoning has for the most part been ignored.

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[1] A recent extension to the Fredericton Industrial Park located on the south-west side of the Vanier Highway has also been developed by private interests (Chippin's Reality).

TABLE 6.1

CURRENT OWNERSHIP OF PROVINCIAL PARKS

Municipality

1. Atholville Industrial Park
5. Belledune Industrial Park
6. Beresford Industrial Park
8. Campbellton Industrial Site
11. Chipman Industrial Park
14. Clair Industrial Park
15. Dieppe Industrial Park
16a. Fredericton Industrial Park
17. Fundy Aquaculture Park (St. George)
18. Grand Falls Industrial Park
19. Grandview Industrial Park (Saint John)
20. Hartland Industrial Park
24. McAdam Industrial Park
29. Nackawic Industrial Park
30. Nashwaaksis Industrial Site
31. Oromocto West Industrial Park
32. Oromocto East Industrial Park
33. Petit Rocher Industrial Park
34. Perth Andover Industrial Park
35. Republic Industrial Park (Edmundston)
38. Sackville Industrial Park
42. St. Jacques Industrial Park
43. St. Leonard Industrial Park
44. St. Stephen Industrial Park
45. Sussex Industrial Park
47. Vanier Industrial Park (Fredericton)
50. Woodstock Industrial Park (Phase I)
51. Woodstock Industrial Park (Phase II)

Private

48. Victory Industrial Centre (Moncton)
16b. Fredericton Industrial Park Extension

Department of Commerce & Technology

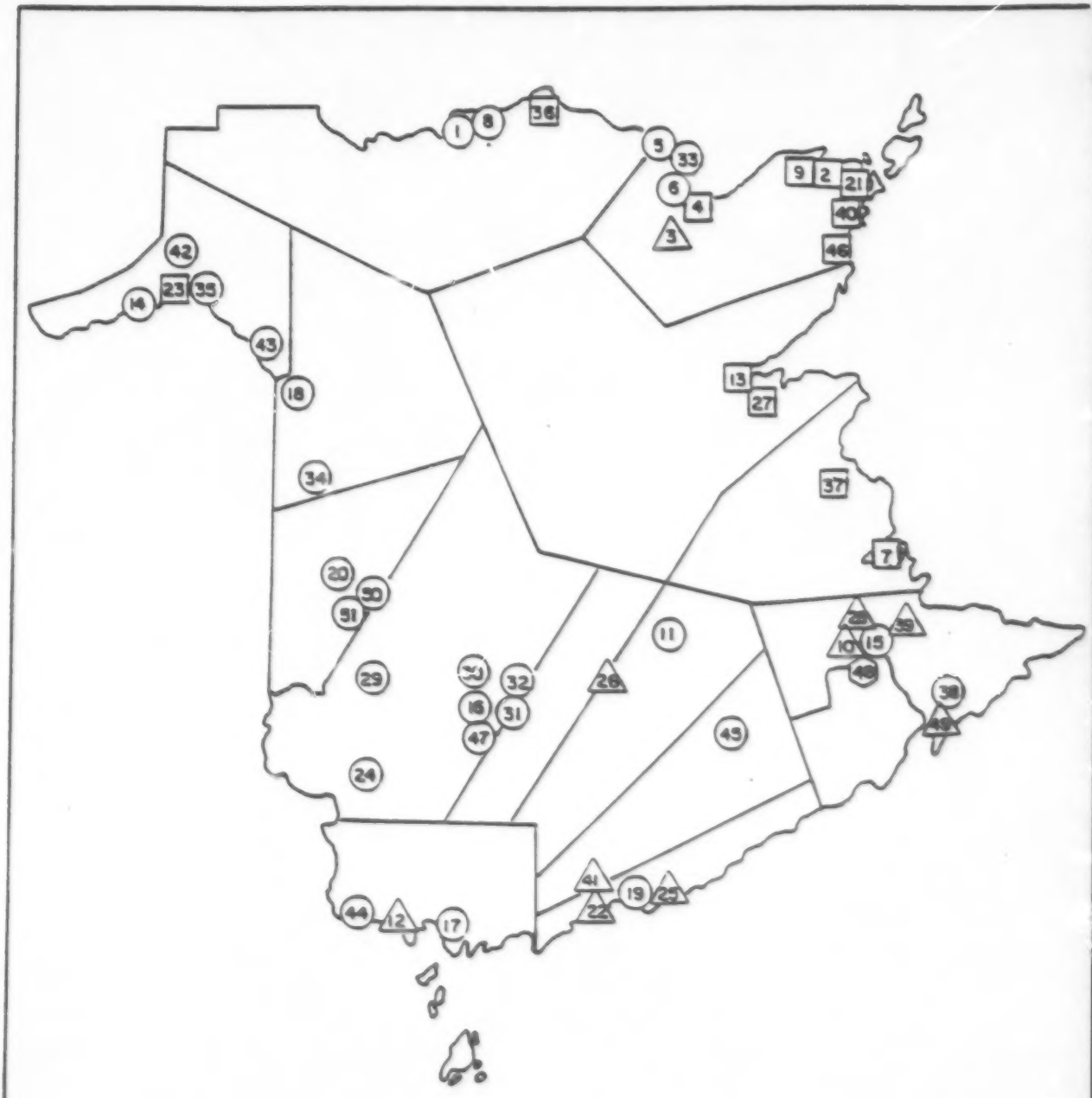
3. Bathurst Forest Complex
10. Caledonia Industrial Estates (Moncton)
12. Champlain Industrial Park (Bayside)
22. Lorneville Industrial Park (Saint John)
25. McAllister Industrial Park (Saint John)
26. Minto Industrial Park
28. Moncton Industrial Park
39. Scoudouc Industrial Park
41. Spruce Lake Industrial Park (Saint John)
49. Westmorland Chemical Park

Regional Economic Development Commission

2. Bas Caraquet Industrial Park
4. Bathurst Industrial Park
7. Bouctouche Industrial Park
9. Caraquet Industrial Park
13. Chatham Industrial Park
21. Lameque Industrial Site
23. Madawaska Industrial Park (Saint-Hilaire)
27. Miramichi Industrial Park (Newcastle)
36. Restigouche Industrial Park (Eel River Crossing)
37. Rexton-Richibucto Industrial Park
40. Shippagan Industrial Park
46. Tracadie Industrial Park

Figure 6.1

CURRENT OWNERSHIP OF PROVINCIAL PARKS


LEGEND:
Department of Commerce and Technology
Municipality
Regional Economic Development Commission
CN Rail
The numbers in each symbol refers to the code number of the industrial park as presented in the listing in Table 6.1.

CN does not sell land in the park, rather they lease space in buildings or lease parcels of land. This park, according to a CN official, acts as an incubator centre where small operations locate and grow. The graduates of Victory can frequently be found in the Moncton and Caledonia Industrial Parks. The official was of the opinion that given the age of the buildings and the services, that this park has served its purpose and should not be further developed as a separate unity.

There has been a proposal that the former CNR Rail Shops area become an industrial park. Should this occur it would then be logical to develop the two areas as a single unit thereby providing a full range of sites and opportunities to budding local, as well as national scale, entrepreneurs.

The other identified exception is located adjacent to the Fredericton Industrial Park. This expansion has been developed by private interests (Chippin's Limited Real Estate). The park includes 179 acres and is approximately 99 percent sold/committed (information provided by personal phone call) with the land having been sold at development cost plus profit margin. The park was promoted by the owner who indicated an interest in acting as agent for a Municipally owned industrial park in the Fredericton area.

6.1.2 Municipal Ownership

With reference to Table 6.1 and Figure 6.1, twenty-eight industrial parks are owned by municipalities. Parks owned by municipalities are dispersed throughout the province. However, the St John River Valley area, with 10 industrial parks between Oromocto and Perth Andover stands out by having all the parks owned by the municipalities (with the lone exception of a privately owned extension to a municipal park).

The advantages of park ownership and management by municipalities is that this operational structure is the closest possible substitute to a tenant-landlord relationship that would exist with private sector ownership. It can consequently provide the most immediate response to tenant companies' demands for infrastructure services; demands which include land zoned for industrial use and equipped with water, sewerage, utilities, and suitable transportation infrastructure, plus support services which may include snow and garbage removal, fire protection, policing, and grounds maintenance.

In return for providing these services in a satisfactory fashion, the municipality benefits from land sales, employment, economic activity, and property tax revenues. Municipalities are also the most immediate and direct beneficiaries from the establishment of new businesses in the industrial parks since they are the first to realize the positive results of investment (building permits), construction (employment and purchases), and operations (property taxes, employment, economic activity). At the same time, the municipalities are the first to experience the

implications of unhappy park tenants in terms of direct losses to the community of the above-mentioned benefits should companies leave the park.[2]

Since municipalities benefit directly from business activity in the industrial parks, municipal councils should clearly see it in their long term interests to develop and maintain the necessary park infrastructure, and promote the parks to as many prospective tenants as possible. From the land use planning and zoning perspective, it is also the municipalities who experience the positive benefits of having industry concentrated in specified areas like industrial parks.

The negative aspects of ownership and/or administration of parks by municipalities include concerns that smaller communities lack the staff resources to adequately administer industrial parks in a manner which will facilitate their successful development. For example, some smaller villages are administered by part-time officials who may lack the time and/or training in industrial development issues to effectively administer the parks. Along with this are doubts over sufficiency of financial resources to fund necessary infrastructure development by even moderate sized communities. A few persons interviewed also expressed their concern over the inequality of small versus larger municipalities where both are trying to attract industry to their industrial parks.

6.1.3 Regional Economic Development Commission Ownership

Seven of the Regional Economic Development Commissions own industrial parks. As can be determined from Figure 6.1, the 12 parks owned by Regional Economic Development Commissions are concentrated in the northwestern half of the province. All five parks on the Acadian Peninsula are owned by the Economic Expansion Commission of the Peninsula, two parks are owned by both the Miramichi and Kent Region Development Commissions, and one park each by the Chaleur, Restigouche, and Northwest Regional Economic Development Commissions.

In addition to direct ownership of parks, all Commissions are involved in promotion of the parks in their respective areas and several are involved in the day to day administration of parks which they do not own. The latter include the Grand Falls, Northwest, and Fundy Commissions which administer the Grand Falls, Republic, and Sussex Industrial Parks for the respective owner municipalities. In the case of the Vanier Industrial Park, administration is shared between the Capital Region Development Commission and the Planning Department of the City of Fredericton.

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[2] This view was expressed by Mr. Bill Buck of the firm INDUCON who works extensively with industrial park planning and is affiliated with economic development courses at Waterloo University.

There are several pros and cons concerning direct ownership of industrial parks by Regional Economic Development Commissions. Using the Newcastle and Chatham Industrial Sites as an example, the MRDC can bring a regional approach to the location of industry in the Miramichi Region. This contrasts with the intense rivalry which frequently occurs between individual municipalities striving to encourage every possible company to their own municipality and to thereby increase their tax bases. The Commissions are also staffed by persons with training and a strong motivation toward regional economic development; whereas, parks in small communities may be delegated to management and promotion by relatively untrained, part-time politicians or village clerks.

On the other hand, potential problems may occur when a Commission owns one, but not all industrial parks in its region. In the Restigouche Region, for example, the Commission owns and administers the Restigouche Industrial Park located at Eel River Crossing; the Village of Atholville operates an industrial park; and recently, the City of Campbellton has established the Centennial Industrial Site. The two municipalities naturally compete fiercely for every potential new business enterprise with the resultant jobs and increased tax base. It is very difficult for the General Manager of the Restigouche Industrial Commission to appear neutral regarding a choice by a business to locate in one of the three industrial parks in her region, when her Commission owns one of them. In fact, given the strong local competition by officials from Atholville and Campbellton, she would more likely have to argue forcefully to defend encouraging a company to locate in the Restigouche Industrial Park rather than in either of the two municipally owned parks.

To a lesser extent, similar problems and frustrations occur in the Chaleur region where the Chaleur Region Development Commission serves Bathurst and surrounding municipalities including Petit Rocher and Beresford. Here the Commission owns the major Bathurst Regional Industrial Park, while smaller parks in Petit Rocher and Beresford are owned by the municipalities. From his perspective, the General Manager of the Commission attempts to encourage "regional" companies to locate in the Bathurst park and more "local" type businesses to the Petit Rocher and Beresford parks. It appears almost inevitable that the two small communities will perceive bias and accuse the Commission of encouraging "all the good projects" to the Bathurst park which it owns, while the municipal parks only get the less prestigious local entrepreneurs.

The types of problems outlined, using the situations existing in the Restigouche and Chaleur regions as examples, would indicate that if Regional Economic Development Commissions are to be the owners of industrial parks, it would be preferable that they own all of the parks in their region.

The other alternative would be that Commissions not own industrial parks. Rather they should be owned by municipalities or others. This was a recommendation made by Price Waterhouse in

their 1987 Study of the Regional Economic Development Commissions.[3] The authors concluded that since industrial parks have now been established in every region of the province, the Commissions should be freed from managing these physical assets. It was argued that Commissions should only be involved in the "software" components of economic development and entrepreneurship and not the "hardware" components. It was felt that municipalities are equipped to remove snow, cut grass, add water mains or sell industrial land. The authors maintained that the Commissions should be limited to promotion of the industrial parks in a manner consistent with the way they promote other strategic advantages offered by their region to new or expanding business.

The Study Team do not wish to enter the long standing debate over the most appropriate role for the Commissions. It is felt however, that owning and/or managing some, but not all, of the industrial parks in a region causes perceptions of bias and potential for on-going frustration among member Municipalities. On the other hand, with as many as nine industrial parks in one Region (CRDC), eight parks in another region (Fundy) and five parks in two regions (Acadian Peninsula and Northwest Region) it would not appear reasonable to recommend that all industrial parks in a region fall under ownership and/or management of the Regional Economic Development Commissions. Furthermore, some of the Commission staff interviewed, including a number of those who now own and administer parks, conceded that they lack both the time and adequate financial resources to own, administer and promote industrial parks.

6.1.4 Provincial Ownership

With reference to **Figure 6.1** and **Table 6.1**, it can be seen that with the exception of the Bathurst Forest complex, the other nine parks owned by Commerce and Technology are located in the southern half of the province. Because of particular concern over the role of the Province in infrastructure investment, a brief summary of the current status of each of these parks follows.

6.1.4.1 Bathurst Forestry Complex

This property includes 860 acres of land located south-west of Bathurst adjacent to highway 430 (the main route from Bathurst to Brunswick Mines). The only tenant on the property is a sawmill owned by Stone-Consolidated Inc. According to company officials, the sawmill recently has operated for approximately seven months per year with 30-45 persons employed.

The complex was built in the late 1960's by the Department of Economic Growth. The rationale at the time was based on the belief that a sawmill would provide a superior alternative use for

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[3] Price Waterhouse; New Brunswick Regional Economic Development Commissions: An Evaluation and Recommendations for Future Regional Development Efforts, a study funded by the government of New Brunswick and the Atlantic Canada Opportunities Agency, 1987.

large logs rather than having them consumed by the pulp and paper mill in Bathurst. It was also hoped that other wood related industries would be attracted and cluster around the sawmill. To this end, approximately $4 million was invested in a sophisticated water system (including five sprinklers dispersed among wood storage piles) and sewage lagoons.

Unfortunately, it is claimed, the region has so few large trees left that the sawmill was never a huge success and more than twenty years later no other tenants appear remotely interested in locating there.

Commence & Technology continue to maintain the infrastructure through a contract with Stone-Consolidated Inc. at a cost of $13,200 per year.

Given the lack of interest after so many years, the Study Team suggest that previous investments in this facility be considered sunk costs. The Province should, as one official has suggested, "seek a willing bride" and attempt to dispose of the facility, either through sale to Stone Consolidated Inc. or some other company.

6.1.4.2 Champlain Industrial Park

This Charlotte County park consists of a 580 acre site located on Route 127, at Bayside. It was established by the Province in 1966 and the first tenant was the Star Kist Canada Ltd. tuna plant (now closed). A much flatter and easier to service location was planned for the park on the site where the campground has since been developed in St. Andrews. However, for a slightly lower price the present site (affectionately referred to by engineers as a rock pile) was purchased and developed.

Presently, 65 acres are occupied and although performance was sluggish for many years, substantial development has recently taken place, with more land sold in the past two years than in the previous twenty-plus years.

Much of this recent development is related to the expansion of the adjacent Sand Point Marine Terminal by the Government of Canada, and complementary park-related infrastructure investment by the Province. Businesses involved in transportation/distribution, including stevedoring and warehousing and associated servicing, are expanding rapidly. As well, there appears to be a creative opportunity to prepare for future park land requirements by encouraging the quarrying of granite from the site.

Being located in a local service district, the park is directly administered from Fredericton by the Department of Supply and Services (management, maintenance and services) and Commerce and Technology (land purchase, development planning). On-site enquiries and day-to-day operations are handled by a resident Park Supervisor, a provincial DSS employee.

The Marine Terminal is administered by Transport Canada through the Regional Manager of Harbours & Ports, in Dartmouth, Nova Scotia. Traffic flow through the port is handled locally by the Champlain Industrial Park Supervisor, under an agreement between Transport Canada and New Brunswick Supply & Services.

During the summer of 1988, the Charlotte County Community Futures Committee submitted to the Province (Mr. John Brydon, Commissioner of Economic Development) and to Transport Canada (Mr. R. E. Hartlin, Regional Manager for Harbours and Ports) a proposal for a revised management structure which would provide for more local involvement, a strengthening of local management, and the marketing of the port. A key component of this proposal was the creation of a local Management Advisory Board which would include appointees from the Bayside Local Service District Advisory Committee, the Towns of St. Andrews and St. Stephen, and the local Chambers of Commerce.

6.1.4.3 Lorneville Industrial Area

This site includes 1400 acres of land situated approximately 20 km southwest of Saint John. The park was set up in the mid 1960's by the New Brunswick Development Corporation as a reserve for heavy industry, particularly those which might benefit from adjacent deep water harbour capabilities. Over the years there have been a number of possible mega projects proposed for the site, including a liquefied natural gas terminal. To date, however, only two tenants occupy approximately 200 acres of the site. These include the three units of the giant Coleson Cove Generation Station, and, more recently, a landfill leased by the City of Saint John. No water or sewage services have been installed, Coleson Cove uses its own well. Existing services consist of an 8 Km chip sealed road with ditch serving the Coleson Cove site. Although no specific land use covenants have been established for the site, the property falls under City of Saint John By-Laws.

Given the limited activity at the Port of Saint John in recent years, and the availability of the Canaport mooring facilities to serve super tanker demands, some people feel the Province should sell the property. Others argue that the property should be retained by the Province because of its future potential for heavy industry.

6.1.4.4 Minto Industrial Park

This park includes 600 acres of land located in the Village of Minto, of which 86 acres are presently occupied by five firms which employ 130-179 people. The park property is partially located in Sunbury County and partially in Queens County. It was established by a Crown Corporation, the Grand Lake Development Corporation, in 1968 as a vehicle to help attract replacement industry for the coal mining activities which were expected to cease. The park experienced rapid development in the early 1970's when a plant was established to fabricate

fibreglass bodies for the ill-fated Bricklin venture. In recent years, however, the businesses located there have provided a significant contribution to the economic life of the Minto area.

The developed part of the park is connected to the Village sewage system, and the industries are connected to an internal water system which also supplies the local hospital. Unfortunately the water supply is unreliable and can presently only supply less than 100 gallons per minute. Recent studies have looked at the feasibility of piping water from Newcastle Creek, since previous attempts to find a suitable well have failed. However, recent information reveals that a new well located near Newcastle Creek has just begun to provide a satisfactory water supply for park tenants and the hospital.

In order to accommodate future business development, the park will need more land serviced, improved sewage treatment facilities, and an upgraded water system. The Park is currently administered by Supply and Services (in a manner akin to Scoudouc and Champlain) and one staff member has recently been assigned to spend part of his time on-site to respond to park and tenant needs.

6.1.4.5 Moncton Area Industrial Parks

Moncton Industrial Park - includes 640 acres of which approximately 540 acres are already developed. This park is rated by many as the most successful in New Brunswick with approximately 2,950 persons employed by 94 businesses. It was established in 1960 and until 1985 was owned by the City of Moncton. Since 1985 park ownership has been in the hands of the Province in return for cancellation of approximately $7 million in debt run up by park management. With only about 60 acres of saleable property unoccupied, the park will soon have to acquire land adjacent to it and will require major investments in infrastructure services if it is to build on its successful record to-date.

Caledonia Industrial Estates - includes 1300 acres of which 103 acres are already developed. Services for 253 acres are available but a $4 million requirement is anticipated within the next five years to provide an interchange at the T.C.H. The park presently has approximately 26 businesses employing 745 persons. It was initially established in the mid 1970's and recently had 60 acres serviced to meet near future demands. This park was also owned by the City of Moncton and was turned over to the Province along with the Moncton Industrial Park as part of the cancellation of the $7 million debt built up in unpaid property taxes and servicing costs.

Today, under provincial ownership, both parks are managed by the Moncton Industrial Development Ltd., a municipal corporation set up by the City of Moncton which presently has four employees and an annual budget of $330,000. The operations of M.I.D. are partially funded through payments provided to the Greater Moncton Economic Development Authority by Commerce and Technology (GMEDA is an umbrella economic development organization for the

Dieppe and Moncton areas). Commerce and Technology receives $11,800 for each acre of land sold in the parks. The recent selling prices for land in the parks was $22,000 for Moncton and $19,000 for Caledonia. The balance of funds from each land sale is split, with half going to the City of Moncton to pay off debt of M.I.D. and half to a park development fund.

Land sales are presently handled by a cumbersome system wherein each parcel is transferred twice - once from the province to M.I.D., and then from M.I.D. to the tenant company. This process is too slow (apparently six weeks is a "fast" turn-around) and expensive (extra legal costs). In the case of land parcels over five acres in size, the province requires an Order-In-Council as part of authorization for a land sale and this slows the process even further. These obstacles to efficient sale of industrial land must be regarded as serious issues to be resolved since they can frustrate potential clients and result in loss of businesses establishing in the parks.

It appears that the two parks in Moncton are being competently managed by the staff of M.I.D. The parks are vigorously promoted and excellent brochures describing the features of the two parks form an integral part of a comprehensive economic development promotion package by the Municipality.

M.I.D. officials argue that the two parks should be turned over to the City of Moncton. Under such a scenario, it is argued, the revenues from an average of twenty acres per year sold at a price of $20,000 per acre would go a long ways toward park self-sufficiency if revenues are all put towards a development fund for future park development.

6.1.4.6 Saint John Area Industrial Parks

McAllister Industrial Park - is situated on the Old Black River Road, in East Saint John. It includes a total of 1,500 acres of which only 25 acres are presently occupied. The park was established by the Department of Economic Growth during the late 1960's since the nearby Grandview Industrial Park was nearing capacity. Funding was provided through a cost-sharing program between the Province and the Government of Canada.

A total of 145 acres of the park are presently serviced with water and sewage systems adequate to meet anticipated development needs for several years. Longer term park development will be very expensive both for the park owners to install services and for tenants to conduct necessary site work given the rocky and hilly nature of the property. The park recently had ten tenant companies employing approximately 135 persons. Land sales have been very slow during the past two years.

Spruce Lake Industrial Park - is located on the western boundary of the City of Saint John. It was also established by the Department of Economic Growth during the late 1960's as the first phase of a long term development concept for the Lorneville Peninsula. Total land available is

235 acres, with 40 acres already occupied by 17 businesses employing between 300-350 persons. Since only 56 acres are presently serviced, major infrastructure investments for water, sewer, curb and gutter, and street lighting will be required in the next few years. Park management reports that land sales have been steady during the last two years.

Until recently, both McAllister and Spruce Lake parks had been administered locally on behalf of the Province by the Fundy Region Development Commission. Within the last two years, the City of Saint John established its own Department of Economic Development and administration of the two parks became one of its responsibilities. Under terms of an agreement with the Province, the City pays the Province $11,800 for each acre of land sold in the parks. Recent selling prices in McAllister were only $13,000 per acre (they are considering raising the price to more like $17,000 per acre during the spring of 1991). In Spruce Lake, the asking price is $15,000 per acre. This means that up to 90 percent of the selling price must be turned over to the Province and no substantial local park development fund can be created from land sales.

The two parks appear to be under competent administration, and promotional support is still provided by staff of the Fundy Region Development Commission.

6.1.4.7 Scoudouc Industrial Park

This park includes 645 acres created by the New Brunswick Development Corporation in the mid 1960's. Presently a total of eleven businesses are located there employing approximately 700-800 persons, with Lockwood and Consumers Glass having the largest work forces. The park has a sewage system but many of the lines are several decades old having been installed as part of a Second World War Airforce Base. The treatment lagoon is presently overloaded and a study is underway to determine upgrading requirements.

The water system (internal to the park) is taxed to the limit the aquifer can supply, due to the large demands of Consumer Glass. It is proposed that an enclosed reservoir system be installed.

The public roads in the park area are in need of resurfacing as they are strewn with numerous potholes. Park tenants have been pushing for a new access road to the Shediac by-pass. Besides the inconvenient access, spring weight restrictions on the existing roads limit the shipping capacities of tenant companies.

Growth in the park was stagnant for many years, but land sales have recently picked up.

Daily operation and maintenance of the Park is now in the hands of three Department of Supply and Services employees. It was alleged to the Study Team that tenants have experienced problems from lack of park maintenance.

It was apparent to the Study Team that the Southeast Economic Commission was not strongly involved with activities at the Park. Scoudouc is a local service district and there appears to be no strong municipal interests involved with its promotion and development, although Shediac (about 15 km to the north-east) has occasionally expressed interest in the Park.

6.1.4.8 Westmorland Chemical Park

Sometimes referred to as the Dorchester Cape Industrial Park, this property at Dorchester Cape consists of 234 acres of which approximately 20 acres are presently developed. The park was developed in the early 1960's by the New Brunswick Development Corporation and includes a wharf and warehouse. There is only one business, Atlantic Industries Ltd., located in the park. Until recently, it operated two plants - a metal fabrication plant for culvert pipes, fence posts, guard rails, etc., and a p.v.c. pipe plant. Unfortunately the p.v.c. pipe plant has recently closed.

This park could be used as a monument representing bad park planning. Apparently little or no engineering design work was done ahead of time. In recent years it has also become apparent that an inadequate job was done in searching the title to the property and a serious dispute over title continues. Reportedly, the wharf was hardly ever used. The site has poor highway access. In order to get into the site one has to pass under the CNR main line via an underpass built to early 20th century standards. In winter, in particular, tractor trailers have difficulty getting through.

Commerce and Technology have wisely decided not to put any other services in this park until solid potential is identified.

Recently, Moncton Dock and Railway, a subsidiary of British based Atlantic Shipping Limited, have expressed interest in setting up a shipping and receiving facility for lumber and other products making use of the wharf and warehouse. It is recommended that the Province carefully consider the merits of this proposal before committing any funding. The investing of money in further port facilities located in the extreme tidal zone of the Bay of Fundy headwaters, should be closely scrutinized, given the much underutilized facilities already available in Saint John and Bayside.

If a serious proposal develops, perhaps the Province should look at selling or leasing the site to the company. In any case it should avoid further investments in infrastructure until a viable operation is shown, and preferably end the designation of the site as an industrial park.

6.1.4.9 Provincial Ownership Summary

Positive aspects of provincial ownership of industrial parks include long established experience with parks, those that work and those that don't. Having the Province own some of the parks

could also be considered akin to having Petro Canada as "a window into the oil industry". Some officials interviewed expressed the concern that if the province no longer owned some of the parks, they would be more apt to turn their backs on the requirements for infrastructure funding in the parks.

Other positive aspects of provincial park ownership are the relative financial resources of the province and its ability to negotiate directly with the federal government concerning cost-sharing agreements for infrastructure projects. This contrasts especially with Economic Development Commissions and smaller municipalities who have limited budgets enabling them, in some cases to provide only the most basic level of services to their communities.

The vast majority of persons interviewed, however, were not in favour of provincial park ownership for numerous reasons.

A primary reason is that it puts the Province in a position of perceived conflict of interest. It is an established fact that 28 parks are owned by the municipalities and 12 by the Regional Economic Development Commissions. The managers of these 40 parks generally feel that the provincial ownership of 10 parks puts them at a relative disadvantage when negotiating with Commerce & Technology, either for prospective tenants to come into their parks, or when applying for financial assistance for park infrastructure development. Commerce and Technology is perceived to fund the needs of their own parks first, and, everything else being equal, to steer a higher proportion of prospective clients to their own parks. This image is enhanced by the inclusion of the most successful parks, like Moncton, in the provincially owned group.

Another negative aspect of provincial government ownership of the parks, stated by many persons, is the length of time it takes to complete land transactions. It is claimed that sales have sometimes been lost as a result of the slow process. Beyond the delays incurred, provincial ownership is said to limit flexibility in land pricing practices, and in negotiating the terms of land sales.

The argument was raised previously that the local communities realize the most direct impacts of the industrial parks and therefore should be prepared to make appropriate decisions regarding their future development. At the same time, it is claimed that when the parks are not administered locally, the local business community and politicians generally do not get a feeling of involvement, and the day to day promotion of the parks suffer.

6.2 Potential New Parks

There have been three new industrial park proposals, one is located in Belledune, which when construction is completed will accommodate light industry that will complement the established heavy industrial activity for this area. Another proposed new park is located in Tracadie, which is

being considered due to the poor present industrial park site. A third proposed park is located in Saint-Quentin where civic officials desire to relocate industries from their present main street facilities. The potential of these proposed parks is examined, given the economic and industrial activity of the areas in question.

6.2.1 Belledune

The Village of Belledune has identified a new 67 acre (27ha) industrial site on the west side of the Hodgin Road near the site of the N.B. Power generating station now under construction. The property is owned by the municipality and has been rezoned for light industry. The site is relatively isolated and there was no opposition to the rezoning. The potential water supply and sewage treatment options are currently under review and a consultant's report is expected shortly. The site borders on the CN mainline and rail service could be easily extended to the site, if required. The site is located less than 1 Km south of Route 134 and less than 6 Km from Route 11. It is also located approximately 4 Km from the wharf at Belledune.

The site is located adjacent to a large heavy industrial zone (5000 acres zoned for heavy industry) that includes the N.B. Power thermal generating plant, the smelter owned by Brunswick Mining and Smelting and the fertilizer plant. It makes sense to have an industrial park located near these mega projects to provide a site for new industries or businesses which could supply or service these larger industries or likewise make use of the products produced by these industries.

Village officials indicated that interest in the park has been shown by several local companies as well as by some companies from outside the area. The Economic Commission representative expressed support for the new site as long as it didn't bring in industries which would compete with existing local industries. For instance, the area does not need another metal fabricator. Reference was made to four companies in the area that are now competing for that kind of work.

Provincial Environment officials expressed concern with air quality in the region and felt that any new industry should not be permitted which might further contribute to the problem. This concern would have to be reviewed by environmental engineers taking into consideration the impacts expected once each phase of the power plant is operational.

With the exception of the water and sewer services (which are unknown), the proposed site measures up well on the basis of recognized location criteria for industrial parks. It has good access to regional highways and rail lines and to the port at Belledune. It is physically suitable in terms of topographic considerations and it is compatible with existing and proposed adjacent uses. It is well located to service, supply or utilize products from the adjacent power plant, smelter and fertilizer plant. Provided the water and sewer investigations are favourable and the

park tenants do not compete with existing industries in the area, the park appears to have all the attributes to be successful.

6.2.2 Tracadie

The potential need for a new industrial park in Tracadie arises largely as a result of shortcomings of the existing industrial park site.

The present Tracadie Industrial Park is located north of the Town boundaries on Route 11, in Losier Settlement. The park includes 56 acres, of which six acres were occupied at the time of our survey. However, the Regional Economic Commission which owns the park anticipated four more lots being sold in late 1990.[1] The three existing plants employ a total of ten full time employees. These businesses have their own well for water and septic tanks for sewage disposal since the park is not serviced.

In June, 1990 the Commission estimated that general improvements to the park would cost $122,575 for road upgrading. The Town of Tracadie has been seeking financial assistance to extend water and sewer from the Town to the park. Estimated costs are $391,000 to extend the water and $558,900 to extend the sewage system to the park. Collectively, then, the Commission and Town wish to spend an estimated $1,072,475 to upgrade park infrastructure.

The problem is that the site has obvious deficiencies. For example, the latest business to build in the park (fall 1990) had to remove two feet of peat overburden and fill the hole with sandstone as a foundation for the building. The costs of the excavation and the fill was approximately $6,000.

As a result one must question whether or not the investment might yield better results at another location. According to tests conducted by hydrogeologists, water quality from wells in this area is potentially a severe problem since salt water intrusion was experienced at depths of only 100 feet. High iron and manganese content was also considered likely. Furthermore, discussions with government officials and engineering consultants who were involved with the site selection process for the existing park indicate that the severe site constraints have been clearly identified.

Park officials and Town personnel however view the present site as their industrial park and problems encountered as typical of the region. As a result they are not currently pursuing any park site alternatives. It is also understood an application to Commerce and Technology has been made for financial assistance to further develop the park. Consequently, it is recommended

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[1] An update in information as of Nov. 15, 1990 revealed that two additional plants are under construction and two more tenants are expected to establish plants in the spring of 1991.

that a study be conducted to attempt to identify the comparative costs of an alternative location for an industrial park before government funding is provided for the present site.

6.2.3 Saint-Quentin

The Saint-Quentin Village Council has approached the Department of Commerce and Technology for assistance to establish an industrial park. The immediate purpose of the park is to permit the relocation of industries from the centre of the Village where they are unable to expand their operations. It would, at the same time remove the heavy two-way traffic centred on the side streets leading to the mills, a sawmill and a shingle mill.

The site selected by the Council is located 1.5 Km northwest of the Village on highway #180, close to Highway #7 and abutting on the abandoned CN Railway line that ran between Saint-Leonard and Campbellton. Located on gently sloping ground (2.5%) with good drainage (four to five feet of gravelly loam over bedrock) it should be easy to install the necessary infrastructures.

It was indicated by the Major of the Village that the wells supplying the Village and the Village sewage treatment facility are sufficient to handle the immediate and foreseen requirements of the proposed park. However, the park is located on the other side of the height of land from the Village and it will require, in addition to the 1.5 Km of pipelines, an additional water reservoir to assure water volumes and pressures plus a sewage pumping station to move the industrial effluents over the hill to the treatment facility.

As indicated above the immediate clients will include a sawmill and a shingle mill that have plans for expansion. Their expansion includes the construction of a pallet manufacturing facility and increased lathe production capacity.

To-date the Village has received no response from Commerce and Technology.

6.3 Role of Government

This section reviews the role of government in the development and administration of industrial parks, and based on FGA's survey of the parks and interviews with many persons directly involved or knowledgable in industrial park development and operations, suggestions are made to guide the future direction of government initiatives.

6.3.1 Role to Date

Several provincially owned industrial parks were established by the New Brunswick Development Corporation during the 1960's under the rationale that firms could be encouraged to cluster in pre-established areas. These parks included Champlain, Lorneville, Scoudouc and Westmorland

Chemical. Minto was established in the same time period by another Crown Corporation, the Grand Lake Development Corporation, as a vehicle to attract replacement industry for coal mining. Three others, the Bathurst Forest Complex, McAllister, and Spruce Lake, were developed by the Department of Economic Growth in the late 1960's.

These provincial initiatives encouraged many municipalities and most Regional Economic Development Commissions to develop their own industrial parks and funding was subsequently solicited from the Province under major federal-provincial cost-sharing agreements, especially the GDA agreements. In this way some of the more successful parks like Moncton Industrial, Dieppe, and Bathurst were established, as well as some less successful ones.

When the New Brunswick Development Corporation and the Department of Economic Growth were amalgamated into the Department of Commerce and Development, and more recently Commerce & Technology, the ownership of eight parks became its responsibility.

Subsequently, two more parks, Moncton Industrial and Caledonia, were acquired by the Department when Moncton Industrial Development reached a $7 million dollar deficit situation and sought provincial help. Thus we have the situation today, wherein the Department of Commerce and Technology owns 10 parks and maintains responsibility for funding of other industrial infrastructure projects.

To accomplish its mandate, the Department used to have an Engineering Services Section. Responsibilities of the Section included the management of infrastructure programs, industrial parks, and repossessed properties.

The infrastructure programs were directed at creating or improving serviced industrial land or buildings to attract industries, improving services to the industrial parks and, in some cases, improving services to private businesses. The majority of this work was conducted under the Industrial Subsidiary Agreement, although some work was wholly provincially funded.

The Department also had a considerable inventory of repossessed buildings which invoked responsibilities for maintenance, leasing, sales, security, insurance, etc. In recent years, the Department greatly reduced its responsibilities for buildings by being involved in much fewer first mortgages. At the same time, the Department of Supply and Services has taken increased responsibility for the administration of provincially owned buildings.

Initially, Commerce and Technology had on-site staff at several of the provincially owned parks to oversee daily operations. This is no longer so, and since 1986, the Department of Supply and Services has taken over responsibility for the on-site personnel located at three of the parks owned by Commerce and Technology - Minto, Scoudouc, and Champlain. These are the only three parks where provincial employees are located and the present staff complement totals five

person-years. These staff look after day-to-day operation and maintenance of the parks as well as perform duties with respect to other properties in the general vicinity of the parks for which DSS is responsible.

A summary of existing arrangements for the other seven parks owned by Commerce and Technology is as follows:

- The Bathurst Forest Complex and Westmorland Chemical Park have only one tenant each. At the Bathurst Complex, there is a maintenance contract with the existing tenant ($1,100 per month) to look after park infrastructure. At the Westmorland Chemical Park, the wells were turned over to the existing tenant, and no other services exist.

- At both Caledonia and Moncton Industrial Parks, Moncton Industrial Development Ltd. with four full-time employees, manages day to day operations, acts as property sales agent for Commerce and Technology, and promotes the parks to potential business clients. The Province receives $11,800 per acre of land sold, with the balance split equally between the City of Moncton (in payment of past debt) and M.I.D. for future park development.

- Similarly, at McAllister and Spruce Lake parks, the City of Saint John's recently created Department of Economic Development has become the resident management and property sales agent for these two parks. The Province receives $11,800 for each acre of land sold, with the balance retained by the City.

- The Lorneville Industrial Area is completely unserviced and has no designated on-site manager. The only two property users to date are the City of Saint John (for a landfill) and NB Power (for present and future electrical generation station capacity).

The present role of Commerce and Technology is:

- to ensure that the physical infrastructure assets at the parks are maintained in saleable fashion;

- to administer contracts for needed infrastructure improvements;

- to ensure that prior commitments made to entice tenants to the Parks are honoured to the extent possible; typical commitments would include an adequate supply of quality water being available to provide for future expansion needs;

- to encourage park officials to prepare long range development plans; and

- to use the parks as an industrial attraction incentive as part of its role of promoting the province as a desirable location for business development (recognizing New Brunswick must compete with other areas to attract employment generating industries/businesses).

Over the period 1985/86 through 1989/90 the average annual expenditure by the Province (including Sub-Agreement funding) has been in excess of $1.5 million for infrastructure installation and the related engineering services. This level of funding is obviously inadequate to enable the Department to keep up with the demands for infrastructure funding in 51 industrial parks. The inadequacy of present funding levels is illustrated by the fact that a backlog of over $20 million dollars in required infrastructure funding in the industrial parks has been identified by Commerce and Technology staff.

The Commerce and Technology staff resources allocated to manage and administer the ten parks owned by the province, to administer contracts and monitor performance of the other 41 parks, as well as to work with those park officials, consists of one in house professional and a part-time secretary assisted on an ad hoc part-time basis by a professional engineering consultant. The annual operating budget for this function was approximately $150,000 during 1989/90 - less than ten percent of the average expenditures for infrastructure and engineering.

In any situation such as this where staff resources are grossly insufficient, even the best of intentions will not enable the staff to achieve the objectives set before them. The most that is possible for them to do is to react to demands made upon them with the normal result frequently being that it is the wheel that squeaks the loudest that gets the grease.

When staff are compelled to be "reactive", the day-to-day activities required for the effective operation and promotion of the New Brunswick industrial parks have to be dropped. The desirable "proactive" stance is unachievable with present staff resources and the result is:

- assistance to park officials for long term planning and design of appropriate infrastructure is limited;

- assistance with the design and development of a minimum level of park promotional material is not provided;

- a data base on all industrial parks in the Province has not been developed as part of a province-wide promotional plan;

- a common base for the evaluation of the success of industrial parks, as a group of related infrastructure components has never been prepared; and

- that no long term consideration of the role of industrial parks in the economic development of New Brunswick can be attained.

6.3.2 Survey Responses

Several questions in our survey of the industrial parks focused on the appropriate role for the Province in industrial park development and operations. Responding park representatives clearly indicated they did not think the Province should be directly owning/administering parks. Of the forty responses received only two (filled out by the province) favoured sole provincial administration of parks, while four others indicated some combination of the province with one or more of the municipalities, Commissions, and private sector. Meanwhile, fourteen responses indicated the municipalities should administer the parks and a further thirteen responses indicated the municipalities plus one or more of the other groups. Ten responses indicated the Economic Development Commissions with another twelve indicating the Commissions in association with one or more of the other groups. Interestingly, no responses indicated the private sector alone should administer the parks although seven responses indicated a role for the private sector along with municipalities and/or Commissions.

Frequently comments indicated that municipalities and/or Commissions, being close to the parks and people who work and live in the area, can be more responsive and knowledgable of local needs. While municipalities were deemed to generally have the best local interest in the parks, some felt that the Commissions are in a better position to balance local political pressures and take a more regional interest in economic development.

When asked for suggestions on how the role of the Province could be made more effective, twenty-four of thirty-two responses pertained to the need for an on-going provincial program to fund park infrastructure. Typical responses indicated that the Province should have a financial assistance program to help owners in developing park infrastructure, including water, sewerage, streets, and lighting. Others went further, to qualify that financial assistance should be concentrated in areas where growth is strong. A more standardized approach was suggested whereby successful parks should receive a higher priority in terms of eligibility for funds for future expansion. One respondent indicated that a financial assistance program should encourage successful industrial parks to prosper and not attempt to foster development contrary to market forces. Obviously a supporter of the growth pole concept, the respondent went on to suggest that "should this result in development being geographically concentrated, then so be it, it is probably more efficient than most alternatives". Some suggested that more funds with less "red tape" might be suitable if the Province adopted a policy of funding at a certain known level for various elements in park development such as land acquisition/servicing, etc.

Besides the suggestions on funding, the commentary also suggested that the Province could act as an educator regarding industrial park development and help small municipalities, in particular,

with industrial park management by supplying information and hosting seminars. The Province was encouraged to continue in their external seek and find efforts and enhance that through increased promotion. One respondent, on behalf of a small municipality, suggested that the Department should have more business development officers around the Province, willing to work with municipalities who are interested in expanding and investing in their own industrial parks.

General comments provided by the respondents also contained numerous suggestions regarding the role of government. Comments like the following were typical.

> "Industrial parks were the in thing in economic development in the late 70's and early 80's. Politics played a role in establishing some parks. Emphasis should now be put on the zoning benefits and environmental benefits of locating industries in central areas. Traffic, noise, odours, etc. are less of a burden. We should no longer have cement plants on the main street of our communities."

Generally it was felt that industrial parks have an important role to play, however, good planning and industrial site selection criteria are essential components that have not always been followed. Industrial parks were considered an investment in the future which has played an important role in the past and will continue to do so in the future, although some considered that the planning function should play a higher priority in industrial park policy in the future.

It was also suggested that industrial parks play different roles in certain areas. While some of the parks play a regional role and can serve as an attraction to outside business, in much of the province the primary clientele of the parks are local business with infrastructure needs that may not be as great.

Larger communities had concerns about having to compete with small municipal parks who tend to sell land at very low prices and also tend to have lower tax rates which can in itself make them more attractive to potential entrepreneurs. It was suggested that after allowance for an initial development period, parks should not sell land below the actual development costs. On the other hand the small communities felt they could not compete with the services and amenities offered by the large communities, services such as full-time fire and municipal sewage systems plus the amenities of a wider social, education and entertainment base.

As noted above, some respondents felt that the Province should place more emphasis on providing infrastructure funds to the parks with demonstrated success. It was suggested that there is too often a tendency to prop up parks that are not doing well while assuming the more successful ones should be able to take care of themselves. Several persons commented that more attention should be paid to park appearance and "aesthetics".

Besides the responses to the industrial park questionnaires, many views were provided regarding the role of the Province in industrial park infrastructure during the personal interviews.

The most consistent message was that an on-going program of provincial financial support for infrastructure investment is necessary. In fact, several persons interviewed cautioned that they would prefer to see the Study Team downplay or avoid potentially controversial issues surrounding park ownership (Province, Municipality, Economic Development Commission) because of fears that the ensuing arguments might detract from the following more important principle. That is, regardless of whether or not the Province owns any industrial parks, provincial financial involvement is essential. The expenses are too large for the municipalities or the Economic Development Commissions to handle on their own. Therefore, if industrial parks are to continue functioning, funding of infrastructure investment will have to involve cost-sharing arrangements between the Province, the affected Municipalities, and the affected companies. In fact, given the benefits realized by the Federal government in the form of personal and corporate income taxes associated with business activities in the industrial parks, cost-sharing arrangements, such as have taken place historically between the federal and provincial government, are also warranted.

A second message generally agreed upon was that the municipalities should pay a share of infrastructure investments for funding of new parks as well as for funding of improvements in existing parks. Municipal financial involvement is justified based on the benefits accrued from land sales, property taxes, employment and spending stimulated by tenant companies and their employees. Municipal financial involvement also encourages stronger local commitment to park development, promotion, and on-going administration. The level of effort of Municipal financial participation for park funding was less clear, although a number of persons felt approximately 50 percent funding by the local municipality was a reasonable target. This level of cost-sharing is the average level of cost-sharing used as a guideline by the Province of Nova Scotia, although the percentage level varies depending on the particular circumstances of each case.

The Study Team feel that the Regional Economic Development Commissions generally do not have the financial resources to invest in new or expanded industrial park facilities. In fact, some of the Commissions which now own parks commented that they do not generate enough revenues from land sales to cover the property taxes on the unsold park lands. Certainly it is desirable that whoever owns parks have established a park infrastructure development fund into which revenues from land sales is deposited.

With regard to the private sector, there is little to indicate that major private developers are prepared to invest in serviced land for industry. One developer in Fredericton has very recently been quite successful in developing and selling lots on the west side of the Vanier Highway adjacent to the fully developed Fredericton Industrial Park. At the present time, CN Rail officials are studying the potential uses for the former properties of the CN Rail Shops in downtown Moncton. We understand that they have already approached Provincial officials regarding the availability of funding to service the property for industrial park development.

The Victory Industrial Centre is the other CNR owned industrial park land in Moncton. It lies between the Moncton Industrial Park and the CN yards and is really more of an industry mall than an industrial park since land is not sold, but leased to tenants many of whom are located in old buildings formerly owned by the Department of National Defense. These are the only sizeable private sector initiatives the Study Team is aware of and it appears that the development of serviced land for industry in New Brunswick will continue to be largely a requirement of the Public Sector. However, the private sector should continue to play an important indirect role in infrastructure funding as park tenants. The revenues from land sales can contribute towards future park needs, and the property tax payments and other taxes contribute to Municipal and Provincial financial ability to fund infrastructure.

It was also suggested that park tenants could play a more direct role in park development by forming tenant associations to police adherence to property use and cleanliness guidelines and to promote reasonable standards of building and property maintenance aesthetics among park tenants.

It may also be reasonable to expect park tenants to have a self-imposed tax to be used to contribute towards internal park improvements. One interviewee suggested that the most successful form of park promotion is that done by satisfied park tenants themselves. It is not unreasonable to consider having park tenants, in concert with park management, to host a reception once every year or two wherein potential park tenants are invited to discuss the pros and cons of "park living" with existing tenants.

It was generally acknowledged that the role of the Province should be one of overall coordination, funding, external promotion and regulation, whereas local management and administration should be the responsibility of the communities who may or may not choose to contract with a Regional Economic Development Commission for park promotion and other park management needs.

6.3.3 Opportunities

As part of its coordination role, the Province should establish reasonable standards for park servicing and promotional materials. With regard to park servicing, several persons commented on the importance of the engineering services provided by the Department. Small communities in particular need guidance regarding the quality of water supply and system, sewage handling, roads, storm drainage, and electrical services which are realistic for their given circumstances.

With regard to promotion, it was shocking to find that only 54 percent of responses to the questionnaire indicated that a promotional brochure was available. Every park, regardless of its state of development should at least have a typed fact sheet which can be photocopied as required and updated annually. This fact sheet would contain a listing of park land availability

and services, ideally a sketch of the park lot plan showing lots available, zoning, restrictive covenants, land prices, and related pertinent features.

Copies of this information should be available in an orderly fashion at Commerce and Technology as well as from park officials. The painful process which ensued in order for park officials to respond to some of the basic questions pertaining to park infrastructure for this study clearly indicated the very low level of effort maintained by many parks regarding promotional material and basic knowledge of infrastructure services.

Commerce and Technology is criticized as well for uncoordinated efforts with respect to park promotion. Brochures are made for some parks, and not others. No real effort is extended to maintain a file of current literature regarding the status of the parks. It appears that when a request comes to the Department regarding information on industrial parks, the typical response is to mail (or these days fax) the request to all the parks. Park administrators complained that they have, for example, recently been requested to fill out three highly detailed questionnaires sent by the Department within a two month period.

One unfortunate consequence of the Department not having a readily available inventory of the current status of infrastructure at the 51 parks is that their promotional staff are not as well informed as they should be to direct potential business clients to the most appropriate parks. This can lead to projects being undertaken in parks with inadequate services, with resulting high costs for installation of custom services which might be avoided by directing Clients to parks which can readily meet their needs.

With regard to park funding, funding should be limited to existing parks which have a demonstrated track record (i.e. previous land sales and established businesses in the park) and evidence of imminent demands for more serviced land. The merits of requiring each assisted park to allocate all funds from land sales to a park development fund should be considered.

The regulatory role of the Department would ensure that funding provided for park infrastructure is utilized for the intended purpose. This could be accomplished by requiring expenditure justification reports to be provided and by on-site monitoring of work conducted. Regulations concerning park land usage should be generally applicable throughout the province. As well, minimum standards for building set backs and other restrictive covenants could be established.

Finally, the Province should also consider the merits of designating a tri-level hierarchy of existing industrial parks. At the top, a small number of regional parks would be designated which can realistically be expected to attract major firms as tenants. The second tier of parks would include many established parks which can best be described as a local business parks where mostly local firms tend to locate. The bottom tier would include, those parks that have attracted few or no tenants over a ten or more year period which should not be considered as industrial parks but

merely as tracts of property zoned for industrial use. The extent and nature of the funding available for infrastructure could be variable according to these three classifications.

Realistically, it could be argued that the industrial parks in only two or three locations in New Brunswick currently fulfil the dual role of serving as a significant tool to attract investment from outside the province, as well as a land use planning role in providing serviced areas for industrial use. This would include the parks in the Moncton - Dieppe area and perhaps one or two other areas.

However, the 51 parks already in place are an established fact, and the Province should encourage a rationalization process whereby a small number of more successful parks are given priority for future development incentives. One way to accomplish this would be to require groups of competing municipalities to work together and designate a number of "regional parks" which would have higher priority for funding eligibility.

The Bangor experience shows that it should be possible, for example, to have neighbouring municipalities like Campbellton, Tide Head, Atholville, Dalhousie and Eel River to work together to establish a strong regional industrial park which has the critical mass to attract outside companies and can offer economies of scale in servicing. A cost-sharing agreement could be worked out by the participating municipalities to fund the municipal share of infrastructure investment. In return, an agreement would be established whereby the revenues from sale of park land is reinvested in a park development fund. Property tax revenues from tenant companies would be cost-shared among participating communities based on a pre-agreed formula, regardless of which community the park was physically located in.

One way to rationalize the existing parks would be to encourage the designation of a "regional" park in each of the province's major regions.

Northwest Region	Miramichi Region
Restigouche Region	Moncton Region
Chaleur Region	Saint John Region
Acadian Peninsula	Capital Region

In cases like the Moncton - Dieppe area, which already has more than one industrial park of regional calibre, the local municipalities could continue to establish their own priorities for park infrastructure funding which can be channelled through the Greater Moncton Economic Development Authority, as at present.

6.3.4 Staff and Budget Needs

Based on the role proposed for the Province and the substantial needs for infrastructure in many of the 51 industrial parks, this section identifies staff needs and the appropriate level of operating and capital budgets within Commerce and Technology.

6.3.4.1 Operating Budget and Staffing

The present budget and staffing of the Engineering Services Section should be expanded to enable Commerce and Technology to be more proactive with respect to industrial park needs. Despite their best intentions, staff are forced to operate now in a largely reactive mode of operation.

It should be remembered that the existing staff complement (one full-time professional, one part-time secretary, and ad hoc assistance from an engineering consultant) has to respond to funding requests by clients for project specific infrastructure as well as the general industrial park infrastructure needs. This is a work load that until recently required three professional staff and a full-time secretary.

The study has identified the need for a strengthening of the Provincial role in park funding, technical assistance, and information maintenance and assessibility. In order to accomplish these roles, two full-time professional positions should be added to the existing staff complement. As well, the existing part-time secretarial position should be made a full-time clerk/secretarial position. An annual operating budget of $300,000 is considered appropriate. (See **Section** 7.2 for Policy Recommendations).

6.3.4.2 Capital Budget

The study has indicated that recent funding levels for industrial park infrastructure are inadequate.

An indication of the appropriate capital budget level for the funding of industrial park infrastructure can be provided based on a review of historical park growth, and identified park infrastructure deficiencies. Responses to the FGA questionnaire indicated that some 2,638 acres of land is presently occupied in the New Brunswick industrial parks. In most cases the majority of businesses have been established in the parks during the past twenty years. This would indicate an annual requirement for approximately 132 acres of industrial park land to be made available and serviced.

The responses to the FGA survey indicated average development costs of approximately $31,000 per year to purchase land and install basic services of water, sewer, and roads. This would indicate annual costs of approximately $4.0 million would be incurred to meet on-going park

infrastructure requirements. If the Province is to fund industrial park needs on an average 50/50 cost-shared basis with municipalities, then an annual capital budget within Commerce and Technology of $2.0 million would be required to meet on-going park expansion needs.

Even though the majority of businesses have established in the parks within the last twenty years, some of the parks were created during the 1960's and the water and related service infrastructure is more than 20 years old and in serious need of upgrading (Scoudouc Park is an example). An annual capital budget is required in order to upgrade and replace infrastructure in present parks as well as to meet specific special needs of major corporate clients which arise. It is estimated that an annual budget of $2.0 million is required to upgrade existing park infrastructure. (Based on undertaking eight projects per year averaging $250,000).

In spite of the Province already having 51 industrial parks, new park proposals will continue to be identified (such as Belledune and Saint-Quentin). In order to be able to respond to these needs it is recommended that $0.5 million per year be budgeted.

In summary, an annual capital budget of $4.5 million is required to meet the proposed Provincial share of industrial park infrastructure needs.

It should be noted that this budget does not make provision for the considerable needs for project specific funding provided to individual corporate clients by Commerce and Technology.

7.0 POLICY RECOMMENDATIONS

Recommendations are provided that will maximize economic development at the regional level as well as for the Province as a whole. They are based on the premise that the Provincial Government holds primary responsibility for the overall economic growth and development of the Province and that serviced industrial park land is required to enable New Brunswick to compete with neighbouring provinces and states for new industrial enterprises.

It must be emphasized that the scope of this study has been confined to the role of industrial parks in the Province. Industry specific assistance, even when the industry is located in an industrial park, was considered beyond the terms of reference and consequently has not been addressed.

7.1 Present Provincial Involvement

Industrial Parks have been identified as a means to attract, control and retain economic development. While it is at the municipal level that the impacts are most immediate, it is the responsibility of the New Brunswick government to assure the continued economic growth of the Province while retaining the quality of life and the environment.

The achievement of this broad mandate is beyond that of any single government department, and there are four Departments involved to a greater or lesser degree in industrial development. The four are Commerce and Technology; Supply and Services; Municipal Affairs; and Environment.

Simply stated, the role of each Department is as follows:

- Land Use and Environment Controls - Department of Municipal Affairs and Department of the Environment.
- Operation and Maintenance of three Provincially owned parks - Department of Supply and Services
- Industrial Development and Economic Growth - Department of Commerce and Technology.

7.1.1 Municipal Affairs

The Department of Municipal Affairs involvement with industrial parks must be recognized as most important albeit indirect. As noted previously, the success of an industrial park is frequently dependent on the availability and price of rural land in the neighbouring area. One way to limit

unregulated expansion of industry into rural areas and to focus its development in a park setting is to have zoning of land use enforced in both urban and rural localities. In non-incorporated areas this translates into the need for regional, district or area plans.

In Nova Scotia, most rural areas are established as county municipalities and have zoning regulations in place. This, unfortunately, is not the case in New Brunswick where rural land use planning is the exception rather than the rule.

Municipal Affairs is responsible for land use planning, both through assistance to individual municipalities and directly for the unincorporated areas of the province. The absence of land use plans in the rural areas poses a major problem to many industrial parks in the province. It also is a threat to the environment and quality of life for the population living just beyond municipal boundaries.

Recommendation: **That the Department of Municipal Affairs take a pro-active role in land use planning and the control thereof in non-incorporated areas of the Province with the goal of limiting industrial development to areas zoned for industry.**

7.1.2 Environment

The Department of the Environment is charged with protecting the New Brunswick soils, waters and atmosphere from pollutants. Since uncontrolled industrial development can become a major source of pollution, it would be a reasonable presumption that Environment would work very closely with the Planning Branch of Municipal Affairs to identify and restrict industrial development in rural areas to sites where the industry would not pose a threat to the provincial or local environment. The Department might also consider the development of industry specific "Performance Standards" which could be used to rationalize the location of industrial concentration.

To date there is little evidence of the two departments working together toward a common goal of protecting the environment through constructive land use planning for industrial development and control.

Recommendation: **That the Department of Environment develop "Performance Standards" to direct the location of industry to sites where the specific industrial activities will not adversely impact the environment.**

7.1.3 Supply and Services

The Department of Supply and Services is responsible for the operation and maintenance of most facilities and properties owned by the Province. It was based on this mandate that it assumed responsibility for day-to-day operation of three industrial parks from Commerce and Technology. The operation and maintenance of these industrial parks, owned by the province and not otherwise seconded to some other public or private agency, implicitly includes the responsibility for the provision of services designed to retain the tenants already located in the parks.

As recorded in **Chapter 3.0**, the state of infrastructure in some of the provincially owned parks leaves a lot to be desired.

Whether or not the operation and maintenance of these industrial parks should lie with Supply and Services or be returned to Commerce and Technology does not appear to be critical to this study. What is critical is that funds be available, in one budget or the other, to maintain these parks in a condition that will retain the existing industry and serve to attract new industries.

Recommendation: **That funds be made available in the annual provincial budgets to ensure that the three industrial parks recommended for retention by the province are maintained at a consistent high level.**

7.1.4 Commerce and Technology

The Department of Commerce and Technology holds the overall responsibility for industrial promotion and economic growth in New Brunswick. Since industrial parks are a recognized tool for the attraction of industry, the Department must be fully cognisant of the attributes of all parks in the province in order to direct a new industry to the most efficient and effective site. And, it should be able, based on a standard evaluation criteria, to ensure a bank of serviced land is constantly available in each park for new or expanding industries.

As part of its role in the economic growth of the Province, the Department frequently is called upon to support the entry of a new industry to the Province or the expansion of an existing industry. Historically many of these industries have located outside industrial parks, some for very valid reasons, others simply because the land was available and less expensive than the serviced park land. Clearly the siting of industry outside park boundaries does not serve the intent of industrial park development, comprehensive land use planning nor the goal of a pristine environment.

Recommendation: **The unregulated movement of industry onto rural sites should not be supported by the Department through award of grants, loans or**

guarantees to new industries or for the expansion of existing industries without a detailed review of the suitability of an industrial park location.

In the promotion and economic growth of the Province, the Department must be able to provide assistance at the local level. The implications of these responsibilities in terms of funds and staffing will be discussed in detail in subsequent sections.

7.2 Proposed Provincial Role

In this section the role foreseen for the Province is reviewed in terms of funding, staffing, park ownership and the evaluation of parks.

7.2.1 Funding Requirements

The socio-economic evaluation of industrial parks revealed the inherent value of successful industrial parks. For the two parks subjected to a detailed analysis, they returned to the national economy in one year the equivalent in 1990 dollars of the total spent on their land and infrastructure development over 20 to 30 years.

The Study has also shown that the cost to develop the land and infrastructure required by industry is, at over $31,000 per acre, beyond the financial capability of most municipalities. It therefore appears necessary that the Provincial Government should have funding available (with Federal Government participation) to assist with the installation of park infrastructure and/or additional land acquisition on a demonstrated "as needed" basis.

Over the last five years, the Department has had an average annual capital budget expenditure on industrial parks and special industrial projects of just over $1.5 million. Were this entirely available for industrial park enhancement, it would have permitted the purchase and servicing of less than 50 acres per year. This is considerably less than the estimated annual requirement of 132 acres calculated in Section 6.3.4.2, even at the recommended cost-sharing split of 50-50 with the park owner.

The condition of the existing infrastructure in many of the industrial parks is such that it requires immediate attention. Scoudouc, initially serviced as a Second World War air training establishment close to 50 years ago, is a prime example of the need for financial attention.

Such capital budgetary needs, when combined with the demands for assistance to establish new industrial parks (present requests at Belledune and Saint-Quentin), indicate a capital budget requirement, in 1990 dollars, of $4.5 million per year.

The Survey results showed a wide range in the quality of the promotional material presented by the individual industrial parks from non-existent to a very informative glossy brochure. A minimum standard of quality for promotional material is necessary. To achieve this objective a one page fact sheet should be a precondition to any provincial funding assistance.

The Nova Scotia Government has recognized these needs and does supply funds for promotion to economic commissions and to park owners - municipal or commissions - as well as for needed services or additional land. For the latter, it has established that the desired sharing of costs between the owner and the province is 50-50, with some variance permitted.

The Study has not included a detailed investigation of the appropriate level of cost-sharing. However, without adequate annual funding the industrial park program will fail to provide satisfactory results.

Recommendation: **The Province must establish a minimum standard of promotion for industrial parks and provide, with Federal assistance where available, financial assistance for park expansion in terms of infrastructure or additional land. The Nova Scotia format for funding assistance should be considered.**

An annual capital budget for industrial park expansion and upgrading of approximately $4.5 million in 1990 dollars should be recognized as a sound economic investment by the Province.

7.2.2 Staffing

The Province of New Brunswick supports 51 industrial parks. Commerce and Technology have one full-time professional employee, a part-time secretary plus a consultant on an as-needed basis to supply this support. However, the same personnel have the added responsibility of responding to requests for the evaluation and analysis of specific industry funding. And, for much of the year, the specific industry requests consume the majority of their time.

Supply and Services have five employees engaged in the maintenance and operation of three provincially owned parks together with other nearby facilities owned by the Province.

The Study indicated the role of the Province should be extended to assisting park owners and operators with long term planning, promotion, design standards and project evaluation as well as enlarging its efforts in collection of pertinent data on all parks and increasing its overall promotion of the province.

Recommendation: **Commerce and Technology staff should provide assistance to park owners and operators with long term planning, promotion, design standards and project evaluation. Commerce and Technology should maintain an up-to-date data base on each of the industrial parks.**

These activities will require an increase of staff in Commerce and Technology assigned to the Engineering Services Section. A minimum of two full-time technical personnel will be required to provide the required assistance to park owners and operations. Although this would appear to limit the annual assistance to less than ten working days per park (including travel time), the more successful parks would probably not require help, thereby allowing the necessary minimum of aid to those parks with the greatest need.

Engineering consultants should continue to assist with the design of additional infrastructure and to help with the evaluation of funding requests, as required.

An up-to-date data base on each of the industrial parks should reveal the history of park development, the infrastructure and available serviced land, the products and services provided by tenant companies, the market areas served and the employment created. The initial assembly of the data might most efficiently be collected and tabulated on a contract basis, thereafter updating on an annual basis should require not more than two person-months. It is estimated that the present operating budget of $150,000 for the Engineering Services Section should be doubled to provide the necessary services.

Recommendation: **That the Department of Commerce and Technology increase the staff and budget of the Engineering Services Section to include the addition of a full-time clerk/secretary, and two full-time professionals to provide on-site assistance to park owners and operators. Contracted services of engineering consultants should continue to be utilized for such services as design and review of infrastructure requirements.**

7.2.3 Park Ownership

The role of the Province as owner of ten industrial parks was seen by many respondents to the Survey and interviews as a conflict of interest. This viewpoint arises from the apparent, or at least potential, bias of provincially owned parks competing with the other 41 parks for provincial funding and for major tenants.

Recommendation: **For each of the industrial parks presently owned by the Province the following:**

- **Bathurst Forestry Complex:**

  Has had no land sales in more than twenty years. If no activity in 1991, Province should divest interest to Stone Consolidated Inc. or other interested party;

- **Champlain Industrial Park:**

  Located in Bayside Local Service District with on-site inquiries and operations handled by Supply and Services. The Province should encourage a local Advisory Board be established to encourage community involvement and assist with park promotion;

- **Lorneville:**

  Located approximately 20 km southwest of Saint John. Contains 1400 acres with 200 acres presently occupied by NB Power and a temporary landfill operated by the City of Saint John. Although none of the anticipated heavy industrial projects for the site have materialized, the park should be maintained because of its future potential for heavy industry. No infrastructure investments should be made until demand is clearly identified;

- **Minto Industrial Park:**

  Located in Village of Minto and administered by Supply and Services. There should be an attempt to involve Village in advisory to improve dialogue between the community and the park and to assist with park promotion;

- **Moncton Area Industrial Parks:**

  Moncton Industrial Park and Caledonia Industrial Estates are both managed by Moncton Industrial Development Ltd, a municipal corporation. The two parks should be turned over to the City of Moncton;

- **Saint John Area Industrial Parks:**

  McAllister and Spruce Lake Industrial Parks are administered by the Saint John Department of Economic Development. The two parks should be turned over to the City of Saint John;

- **Scoudouc Industrial Park:**

  Has no local involvement and suffers from alleged lack of maintenance. Infrastructure will have to be upgraded by the Province. No apparent local group to manage park. Possibility of local advisory board should be investigated to improve community involvement and assist with park promotion; and

- **Westmorland Chemical Park:**

  Only one industry in park with possible interest from one other. Title to land may be flawed. Province should consider divestment or leasing of property.

A negative point of provincial ownership of industrial park land is the length of time required to complete the sales transaction. Nova Scotia surmounted the problem by vesting title in a Crown Corporation. For those park lands retained by Province, consideration should be given to this solution.

7.2.4 Park Evaluation

It became clear to the Study Team that a common methodology was required to evaluate the success of an industrial park and to appraise a request for funding assistance. Such a process would provide Commerce and Technology with a weighting system that could quickly segregate the parks with the greatest need and potential from those parks with needs but limited potential.

To facilitate this evaluation, the Study Team has designed a form (see **Appendix F**) that will serve as an application for funding for the servicing or purchase of industrial park land. Although designed primarily for use by existing parks, the application form may also be used by proposed park developers. The evaluation of applications for funding should relate to the park's past performance, future plans, anticipated land sales, employment, tenant market areas and tenant growth.

Recommendation: **That the Department of Commerce and Technology employ an application form such as is detailed in Appendix F to establish a**

standardized set of evaluation criteria for reviewing funding assistance.

7.3 Role of Municipality and Commission

The Study has attempted to show the pros and cons of ownership and administration by municipal governments and by Regional Economic Development Commissions. It appears logical that municipalities, which garner many of the benefits, be the owners of the parks since they are closest to the park tenants, can buy, sell and service land and also have the equipment required to maintain the park. For Regional Economic Development Commissions, industrial parks are only one of the economic development tools they have to work with. Many commissions lack the human and financial resources to own, administer and promote industrial parks in addition to their other responsibilities. Commission staff, however, are generally well suited to promote the industrial parks. It would appear logical, particularly in the case of parks owned by smaller communities, that they contract with the Commissions to assist with the promotional activities required by the parks.

The interviews revealed that there is no clear-cut answer regarding the most appropriate form of park ownership. Some parks are competently administered by Commissions, and some are competently managed by municipalities. Each situation, varies with the relationship existing between municipality and commission, and is further complicated by the presence of provincially owned parks. The problems in the Miramichi are different from those in Bathurst, from the Acadian Peninsula and so on. Consequently the Study Team arrived at the consensus that where there is satisfaction with the existing ownership situation there is no reason for change. Where there is not satisfaction, the Study Team advises a case by case study.

7.3.1 Park Classification

With 51 industrial parks scattered about the Province, and without a standard process of park evaluation in place, it was no surprise to find that there is no established hierarchy of parks in the Province. Presently parks can only be classified as large or small, or successful as opposed to less successful.

The Study Team is of the opinion that there should be a minimum size classification for industrial parks. In other words, to qualify as a park, and coincidentally for Provincial funding assistance, the parcel of land must be zoned industrial and have a minimum of 30 developable acres (12 ha) to be designated as an industrial park. Any parcel of land with less than 30 acres should be recognized only as land zoned for industry.

Furthermore, it became evident during the study that all parks are neither equal nor should they be considered as equal. While it could be argued that in only two or three regions of the

province do parks fill the dual role of attracting investments and confirming land use planning, there is a need to encourage the establishment of a province wide classification applicable to all the parks.

As a minimum, a tri-level hierarchy of parks should be confirmed. It would consist of a top level of regional parks, which can realistically be expected to attract major firms as tenants; a mid-level of local business parks which would cater to local entrepreneurs; and a bottom tier of parks that have attracted few, if any, tenants. Technically, the third tier should not be classified as parks but as property zoned industrial.

The "regional" designation should be limited, preferably to one in each of the province's regions as detailed in **Section 6.3.3**.

Recommendation: **To qualify for Provincial funding assistance, an industrial park should have a minimum of 30 developable acres (12 ha) and be classified as a regional industrial park or as a local business park. Land zoned for industry of lesser acreage should be considered only on a project specific basis. There should be a maximum of eight regional industrial parks in the Province.**

7.3.2 Regional Industrial Parks

The Study Team recognize that the establishment of "Regional" industrial parks requires a dedicated effort that will have to be spearheaded by the Department of Commerce and Technology. However, there are experiences elsewhere that can be reviewed for guidance.

As recorded in **Section 5.3**, the Greater Bangor Area has approached industrial development on a regional basis, setting up a non-profit development corporation to co-ordinate the activities. The coordination included the establishment of park development standards, control of promotion and responsibility for the sale of land. More importantly, the corporation was responsible for obtaining the cooperation of the participating municipalities in undertaking a property tax sharing agreement whereby the development costs of and the tax revenue from the regional industrial parks is shared on a pro-rated basis.

In the opinion of the Study Team, such an agreement between participating municipalities will be necessary for the regional park system to operate effectively. How this may be implemented in New Brunswick should be the subject of a review by the Department of Municipal Affairs.

7.3.3 Financial Assistance

The Study has defined the Municipality as the most immediate beneficiary to the location of a new tenant in the local industrial park. It is therefore of paramount importance that the municipality be involved in all aspects of park development and promotion.

In Nova Scotia the government has set a goal of a 50 percent financial involvement by the municipal government. Without a detailed analysis, it appears to the Study Team that so long as all revenues from the sale of industrial park lands are reinvested in the park for capital and operational budgets, the 50 percent goal is merited.

Capping this involvement should be funding made available by the Province on an as needed basis, within total annual budget constraints, based on the evaluation of the funding request.

7.3.4 Park Management

The use of park regulations and covenants on land use, and aesthetics, are employed less in New Brunswick than in most other areas.

The example shown in Nova Scotia by the Burnside Park in Dartmouth is of note in this regard. The Burnside Park requires all prospective tenants to complete an application form that spells out what the company plans on doing, what are the intended products or services and what will be the land use on the lot. Based on the information provided the park management can locate the enterprise to fit in most efficiently with its neighbours, not only in terms of type of business but also in terms of environmental impacts and infrastructure requirements.

New Brunswick industrial parks should be utilizing such evaluation procedures, and to encourage the expansion of this practice the Study Team has provided a sample application form (See **Appendix G** of the Final Report).

APPENDIX A

DATA COLLECTION OVERVIEW

APPENDIX A

STATISTICAL REVIEW

This section provides a statistical overview of data collected through the FGA questionnaire that was sent to representatives of the 51[1] industrial parks in New Brunswick. Of the 50 parks that were contacted 44 were returned for a return rate of 86 percent.

The following parks have not returned the questionnaire for various reasons:

Atholville Industrial Park: No response to questionnaire.
Bathurst Forest Complex: This park is owned by Commerce and Technology, no response from this department.
Fredericton Industrial Park: This park is full, it is owned by the tenants.
Nashwaaksis Industrial Park: This property is to be rezoned to residential.
Victory Industrial Park: Is a private park which is owned by CN.
Woodstock Industrial Park (new): This park is an extension of the old park and is vacant. Commentary provided in the response for Woodstock (old) also covered Woodstock (new).

When one excludes Belledune, Nashwaaksis, Woodstock (new) and Victory, the response rate is 96 percent.

In some instances, one contact person was responsible for the administration of more than one park (Commissions, Government) thus there is a duplication of some of the opinion related questions. However, all answers received were used to form the data base regardless if they were repeated by the same contact for different parks. The following statistical analysis is essential to the formulation of meaningful conclusions and appropriate recommendations on policies for industrial parks in New Brunswick.

RESPONSES TO INDUSTRIAL PARKS QUESTIONNAIRE

3. Who owns the park?

Province	9 responses
Economic Development Commission	12 responses
Municipality	23 responses
Other	0 responses

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[1] The Victoria Industrial Park in Moncton which is privately owned by CN was not included in the questionnaire mailing list. However, contact has been made with a representative of CN regarding this park.

Parks Owned by the Province

Park Reference #	Park	Administration
10	Caledonia	Moncton Industrial Development
12	Champlain	Department of Supply and Services
22	Lorneville	Department of Commerce & Technology
25	McAllister	City of Saint John, Department of Economic Development
26	Minto	Department of Supply and Services
28	Moncton	Moncton Industrial Development
39	Scoudouc	Department of Supply and Services
41	Spruce Lake	City of Saint John, Department of Economic Development
49	Westmorland	Department of Commerce and Technology

Parks Owned by Economic Development Commission

Park Reference #	Park	Administration
2	Bas Caraquet	Economic Expansion Commission of the Peninsula Inc.
4	Bathurst	Chaleur Industrial Commission
7	Bouctouche	Kent Industrial Commission Inc.
9	Caraquet	Economic Expansion Commission of the Peninsula Inc.
13	Chatham	Miramichi Region Development Commission
21	Lameque	Economic Expansion Commission of the Peninsula Inc.
23	Madawaska	Northwest Industrial Commission Inc.
27	Miramichi	Miramichi Region Development Commission
36	Restigouche	Restigouche Industrial Commission Inc.
37	Rexton-Richibucto	Kent Industrial Commission Inc.
40	Shippagan	Economic Expansion Commission of the Peninsula Inc.
46	Tracadie	Economic Expansion Commission of the Peninsula Inc.

Parks Owned by Municipalities

Park Reference #	Municipality
6	Beresford
8	Campbellton (Centennial Park)
11	Chipman
14	Clair
15	Dieppe
17	St. George (Fundy Aquaculture Park)
18	Grand Falls
19	Saint John (Grandview Industrial Park)
20	Hartland
24	McAdam
29	Nackawic
31	Oromocto West
32	Oromocto East
33	Petit-Rocher
34	Perth-Andover
35	Edmundston (Republic)
38	Sackville

Park Reference #	Municipality
42	St. Jacques
43	Saint Leonard
44	St. Stephen[2]
45	Sussex
47	Fredericton (Vanier)
50	Woodstock

5a). **Please Indicate:**

Total Acreage in Park - 11,788.36
(43 responses)

Range	Parks No.	Parks (%)
< 50 Acres	12	(28%)
50 - 100 Acres	10	(23%)
101 - 200 Acres	9	(21%)
201 - 400 Acres	4	(9.3%)
401 - 700 Acres	4	(9.3%)
700 Plus Acres	4	(9.3%)

Average Park Size - 274 Acres
Range - 8.19 Acres - 1,520 Acres

Total Acres Presently Occupied - 2,638.20
(42 responses)

Range	Parks No.	Parks (%)
< 10 Acres	10	(24%)
11 - 50 Acres	20	(48%)
51 - 100 Acres	8	(19%)
101 - 200 Acres	1	(2%)
201 - 400 Acres	2	(5%)
401 Plus Acres	1	(2%)

Average Occupancy Rate - 34.5%
Range - 5.3% - 100%

Percentage of Industrial Land occupied is 22.4%

b). **Indicate the approximate land area (acreage) serviced with the following:**

	Connected To Municipal System	Internal Park System	Individual Lot (Well/ Septic System)	Treatment System
Water (38 responses)	2,832.3	207.5	84.3	398.3
	3,124.10 Acres / 11,788.36 Acres	**26.5% of Industrial Park Land is serviced by some type of water system.**		
Sewer (38 responses)	2,792.5	192.0	92.0	484.3
	3,076.50 Acres / 11,788.36 Acres	**26.1% of Industrial Park Land is serviced by some type of sewage system.**		

These figures indicate that land is serviced with water and sewer, on an as needed basis. It appears there is very little servicing ahead of development on speculation that the land will be occupied considering that 22.4% of industrial land in parks is occupied and approximately 26% of the land is serviced with water and sewer.

6. **Do you have or foresee (within 5 years) any problems with:**

a). **Water Supply** (41 responses) **Yes** 14 (34%) **No** 27 (66%)

b). **Water System** (41 responses) **Yes** 20 (49%) **No** 21 (51%)

c). **Sewer System** (42 responses) **Yes** 15 (36%) **No** 27 (64%)

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[2] Privately owned but governed by Municipal bylaws.

d). **Sewage Treatment** Yes 14 (35%) No 26 (65%)
(40 responses)

Eighteen (43% - 45%) of the parks that responded to this question do not foresee any water or sewer problems over the next five year period. These parks are:

Bas Caraquet Industrial Park
Bathurst Industrial park
Caledonia Industrial Park
Chipman Industrial Park
Chatham Industrial Park
Clair Industrial Park
Madawaska Industrial Park
McAdam Industrial Park
McAllister Industrial Park
Miramichi Industrial Park
Moncton Industrial Park
Oromocto West Industrial Park
Oromocto East Industrial Park
Petit Rocher Industrial Park
Restigouche Industrial Park
Sackville Industrial Park
St. Jacques Industrial Park
Vanier Industrial Park

7. What is the rated capacity of:

Water System: It has been indicated that water system capacity should be at least 300 gallons per minute to satisfy industrial activity needs. This question was responded to by 26 respondents, the units that were given describing water system capacity were in some cases not comparable (ie. PSI, size of water mains, individual wells). Of the 17 comparable measures given, only one indicated it could not provide 300 gallons per minute (Minto <100 GPM), while the other 16 all could meet or exceed the 300 GPM minimum.

8a). Indicate the total number of kilometres of each type of road surface and drainage characteristics.

The most common type of road surface and drainage was asphalt with curb and gutter and storm sewer followed by asphalt and ditch and then gravel and ditch.

b). What type of road upgrading is required within the next 5 years? Please comment.

This is specific to each park, depending on future development demand. Most of the respondents indicated that their park roads will require upgrading or additional roads will need to be built in the future, dependent on demand.

9. What type of electrical services are provided? (43 responses)

Three phase power was provided in some manner (overhead, underground) in 36 (84%) of the 43 parks responding. Only four (9%) provided all three (underground, overhead, three phase). The most common type of electrical service was overhead and three phase reported by 26 (61%) respondents while only 1 (2%) indicated that three phase power was provided underground. The breakdown of electrical services is as follows:

Three Phase:

Overhead and Underground	4 (9%)
Overhead Only	26 (61%)
Underground Only	1 (2%)
Not Specified	5 (12%)
TOTAL	36 (84%)

Single Phase:

Underground	1 (2%)
Underground and Overhead	2 (5%)
Overhead (only)	4 (9%)
TOTAL	7 (16%)

The maximum voltage available ranged from 0.32 kV to 124.7 kV.

Specify any upgrading required over the next 5 years. Please comment.

Most indicated their present needs are being met, however, upgrading would be required with future development in the park (ie. poles, lines, increase in voltage).

10. Is your park governed by by-laws, regulations or covenants? (43 responses)
Yes 32 (74.4%) No 11 (24.6%)
If yes, please include a copy with completed questionnaire and check off the following if included in the regulations.

Setbacks	63%	Parking	56%	Building Aesthetics	47%
Side/Rear Yard	56%	Loading	51%	Other	16%
Outdoor Storage	51%	Landscaping	56%		

Of those 11 respondents that indicated that their park was not governed by by-laws, regulations or covenants, five fall under the Economic Expansion Commission of the Peninsula Inc. which have a covenant of development which states that construction must be completed within six months of land purchase. However, this covenant is not enforced.

Park Performance

11a). What criteria do you use to measure the success of your park? (29 responses)
(Multiple response question)

Jobs Created	19 (66%)	Reduced Land Use Conflicts	3 (10%)
Land Sales	11 (38%)	Construction	3 (10%)
Firms Established	10 (34%)	Satisfaction of Occupants	3 (10%)
Tax Base	9 (31%)	Viability of Existing Business	3 (10%)
Inquiries	5 (17%)		
Infrastructure/ Appearance	4 (14%)		

The most frequent comments were that park performance is measured by jobs created, the number of businesses started, and the increase in tax base. Measuring park performance is a relative issue depending on who owns the park. The province may measure success by the number of lots sold; however, employment and increased taxes are also important. Municipalities and commissions tend to measure success in the traditional way - increased employment, increase in tax base and diversification of the local economy.

The 32.5% that gave no criteria are perhaps more significant in not attempting to evaluate success or the lack of it.

b). **Based on these criteria how would you rate the performance of your park, please provide rationale or elaboration.** (30 responses)

This is a relative and subjective rating of park performance. For instance, selling 4 lots and creating 10 jobs in Minto might be considered good performance whereas 4 lots sold in a year in Dieppe creating only 10 jobs would likely be considered poor performance. Some respondents indicated in their comments how they would rate their park. The following is a breakdown of those subjective ratings for the 30 responses to this question.

Excellent	**2 (7%)**
Very Good	**8 (27%)**
Good	**9 (30%)**
Average	**3 (10%)**
Poor	**8 (26%)**

c). **Do you have any suggestions regarding how park performance might be improved in the future?** (36 responses) (Multiple response question)

Major Site Development/Aesthetics	**11 (31%)**
Promotion/Marketing	**8 (22%)**
New/Improved Infrastructure	**6 (17%)**
Government Assistance	**2 (6%)**
Prepare Prospectus on Park and Region	**2 (6%)**
More Land	**1 (3%)**
Common Administration Office/Services	**1 (3%)**
Administered By Commerce & Technology	**1 (3%)**
Better Coordination Between All Levels of Government	**1 (3%)**
Town Ownership of Vacant Land	**1 (3%)**
Access to TCH	**1 (3%)**
Co-operation Among Occupants	**1 (3%)**

Generally, respondents felt that park performance could be improved if the parks were promoted better, and were better maintained (aesthetics).

Promotion

12a). **What methods of park promotion do you currently use?** (42 responses)

Brochures 20 (48%) **Magazines** 6 (14%) **News Media** 8 (19%)
Trade Publications 9 (21%) **Trade Shows/Conventions** 5 (12%)
Other (Please Specify) 19 (45%) **None** 5 (12%)

If available, please include a sample of the promotion kit that you are currently using (brochures, fact sheets, and site plans).

The following data provides specific information on the methods of promotion used by the 37 (88%) respondents that use some form of promotion.

Twenty respondents (54%) indicated that they used brochures, of these twenty responses four (20%) used only brochures, while 16 (80%) used brochures in combination with one or more other methods of promotion. Only two (5.4%) of the 37 respondents used all the methods of promotion, & eight (22%) relied on one method (other than brochures, in most cases the Regional Economic Development Commission). The following is a further breakdown of the various combinations of promotion methods used by the 37 respondents:

Brochures and Commissions	**5 (13.5%)**
Brochures and Trade Publications	**3 (8.1%)**
Brochures and Magazines	**2 (5.4%)**
Brochures, News Media, Trade Publications	**2 (5.4%)**
Word of Mouth	**2 (5.4%)**

Sign at Entrance of Park	2 (5.4%)
Brochures and Trade Shows	1 (2.7%)
Magazines, News Media, Trade Publications	1 (2.7%)
Magazines and News Media	1 (2.7%)
Trade Publications and Commissions	2 (2.7%)
News Media and Trade Publications	1 (2.7%)

b). **Do you have any suggestions on how promotion of parks could be improved?** (27 responses)

It was generally felt the parks should be promoted as a key component of the municipality or the region in which they are located. Also many felt there should be a standard approach for promotion across the province. The province should also be more active in promoting the parks. The dominant suggestions on how park promotion could be improved related to the need for quality promotional materials (ie. brochures).

Promotional Material (Brochures, etc.)	8 (29.6%)
Promote Park through Town	3 (11.1%)
Promote through Provincial Government	3 (11.1%)
Standard Approach in Province	3 (11.1%)
Promote through Economic Commissions	2 (7.4%)
More advertising budget for Commissions	2 (7.4%)
Regional Promotion Committee	2 (7.4%)
Other (included ACOA)	2 (7.4%)
Promote zoning of park	1 (3.7%)
Promote through Commerce and Technology	1 (3.7%)
Trade Show Representation	1 (3.7%)
Aesthetics	1 (3.7%)
Park Tenants promote the park	1 (3.7%)
Should be owned by Province or Town	1 (3.7%)

c). **Who else should be promoting parks?** (32 responses)

Of the 32 responses to this question, the municipality was identified 17 (53.1%) times as having a role to play in promoting the industrial parks. In most instances, the municipality was seen as working in conjunction with other levels of government, the commission or various other groups. Provincial agencies were identified by 19 (59.3%) of the respondents as being a potential promoter of the parks. Four respondents indicated that they believe ACOA, in conjunction with the municipality, would be able to successfully promote their park.

Provincial Government	8 (25%)
Municipality	7 (21.9%)
ACOA and Municipality	4 (12.5%)
Commerce and Technology	4 (12.5%)
Commissions, Municipality, Provincial Government	3 (9.4%)
Municipality and the Province	3 (9.4%)
Local Business Groups	3 (9.4%)
Economic Development Commissions	3 (9.4%)
Park Administration Office	1 (3.1%)
Municipal Affairs	1 (3.1%)
Park Tenants	1 (3.1%)
The region that benefits	1 (3.1%)

Administration

13a). Who can best administer industrial parks? (40 responses)

Responses indicating only one administrative body:

Province	2 (5%)
Municipality	14 (35%)
Economic Development Commission	10 (25%)
Private Sector	0 (0%)
Other (Please Specify)	1 (2.5%)
Total Responses	27 (67.5%)

Responses indicating multiple administrative responsibility:

Municipality, Economic Development Commission and Private Sector	5 (12.5%)
Municipality and Economic Development Commission	4 (10%)
All Combined	2 (5%)
Province and Municipality	1 (2.5%)
Province, Municipality & Economic Development Commission	1 (2.5%)
Total Responses	13 (32.5%)

Most felt that the municipality was best able to administer the park. The municipality by itself was selected by 14 (35%) of the respondents. The municipality in conjunction with other groups, was selected by 27 of the 40 respondents (67.5%). Municipal administration was favoured because it is felt municipalities have a better feel for the local area and have the most to gain from a successful park. Economic development commissions were seen as the best administration of parks by 10 respondents (25%) or in combination with others by 22 respondents (55%).

As a note of interest, the five parks that are owned by the Economic Expansion Commission of the Peninsula Ltd., according to the respondent, felt that they could be best administered by the municipality in which they were located. Government owned parks in Moncton can be best administered by the Economic Development Commission (MID) according to the respondent. There was no mention of private administration alone but five respondents felt that the municipality, the Economic Development Commission, and the Private Sector combined could best administer their industrial park.

b). What is the average annual budget breakdown for your park?

Information was received on the budget breakdown for 23 industrial parks. Of these 23 parks, eight indicated that they have no budget, therefore these eight responses were excluded from the statistics below.

Capital Expenditures (land acquisition and development)

Of the 15 respondents who do have an annual budget, seven have no budget money designated for capital expenditures, leaving only eight respondents who do have a budget that includes capital expenditures. These capital expenditure budgets range from a low of $10,000 to a high of $100,000 with an average expenditure amount of $57,813.

Operations and Maintenance (Administration, Promotion, etc.)

Two of the fifteen respondents who do have an annual budget have not designated any funds to operations and Maintenance. The remaining 13 responses range from a low budget

figure of $2,000 to a high figure of $330,000[3] giving an average operations and maintenance budget of $52,668.

Total Budget

The 15 respondents who have an annual budget range from a low allocation of $4,685 to a high of $330,000[3] giving an average park budget of $76,946.

This question was generally not well answered. Only 14 responses were received for the section on capital expenditures, 19 for operations and maintenance, and 20 identified their total budget. Six respondents indicated that they had no budgets for the parks. These parks were owned either by a commission or the province. There are considerable ranges in both capital expenditures and operations and maintenance, the following breakdown indicates the difference in budget allocations.

Capital Expenditures		Operations and Maintenance	
0 - 10,000	16 (70%)	0 - 10,000	18 (78%)
11,000 - 20,000	1 (4%)	11,000 - 20,000	1 (4%)
21,000 - 30,000	1 (4%)	21,000 - 30,000	0
31,000 - 40,000	0	31,000 - 40,000	0
41,000 - 50,000	1 (4%)	41,000 - 50,000	0
51,000 plus	4 (17%)	51,000 plus	4 (17%)

Total Budget

0 - 10,000	13 (57%)
11,000 - 20,000	1 (4%)
21,000 - 30,000	0
31,000 - 40,000	0
41,000 - 50,000	1 (4%)
51,000 plus	8 (35%)

c). What do you estimate your current development costs per acre are for new park construction?

	(# of Responses)
$ 7,538 Average/Acre for Land	13
$12,208 Average/Acre for Roads	12
$11,683 Average/Acre for Services	12
$31,400 Average/Acre Total	8

Many of the respondents did not include the cost of land as part of their indicated park development costs. Of the eight responses which indicated the costs of land, roads and services:

Range $9,500 - $53,000
Average $31,400

Of the 12 responses which indicated the cost of roads and services:

Range: Roads $4,500 - $25,000
Services $3,500 - $28,000
Average $23,891 for both

[3] Divided between Moncton Industrial Park & Caledonia Industrial Park.

d). Who should provide funding for the development of industrial parks? (37 responses)

The following is the breakdown of responses. Note the preference for provincial funding.

Province	**8 (22%)**
Province and Municipality	**8 (22%)**
Province, Municipality and Commission	**6 (16%)**
Province, Municipality, Tenant, Other	**5 (14%)**
Province, Municipality and Other	**4 (11%)**
Province, Municipality and Tenant	**3 (8%)**
Province, Municipality, Commission, Tenant and Other	**2 (5%)**
Province and Other	**1 (3%)**

All 37 responses indicated that the province should provide funding for the development of industrial parks. Eight responses (22%) identified the province as the sole provider of funds. Most indicated that the Province, in concert with other groups, should provide funding. The combination of municipal and provincial contribution was supported by eight (22%) of the respondents. It was indicated that those parties that collect taxes from the park should in return provide funding. Also many indicated that the reason for government funding was that the municipality could not afford to fund park development by itself (ie. do not have the financial resources, strain on municipal budget.)

Land Sales

14a). Who is responsible for land sales in your industrial park? (43 responses)

Responses indicating only one body is responsible for land sales:

Province	**3 (7%)**
Municipality	**14 (33%)**
Commission	**14 (33%)**
Realters	**1 (2%)**
Other (Please Specify)	**2 (5%)**
Total Responses	**34 (80%)**

Responses indicating joint responsibility for land sales:

Municipality and Commission	**5 (12%)**
Commission and Other	**1 (2%)**
Municipality, Commission, and Other	**1 (2%)**
Province and Municipality	**1 (2%)**
Province and Commission	**1 (2%)**
Total Responses	**9 (20%)**

These results show that at the present time the municipalities are solely responsible for the land sales in 14 (33%) of the industrial parks and jointly in 7 (16%) other parks. The commission also has sole responsibility for land sales in 14 (33%) parks and is jointly involved in land sales in eight (19%) other parks.

b). Do you feel someone else should be responsible for land sales? Who? (43 responses)

Of the 43 responses only 14 indicated that it shou . be someone other than the one presently responsible for land sales. Some provided multiple responses. For the 14 who wished change the responses were as follows:

Province 2 (14%) **Municipality** 9 (64%) **Commission** 3 (21%)
Realtors 3 (21%) **Other (Please Specify)** 2 (14%)

Again, it was felt that the municipality should be involved in land sales. Comments such as: "Important decisions have to be made by the town." It was felt that municipalities have the most to gain by selling industrial land. In some instances it was felt that there should be a combination of responsibility and land sales should be conducted in concert with other parties. The comment by Sussex supports this notion. "Process (land sale) through commission, final approval by municipality." The combination of municipality and another group joint responsible was identified in five (36%) of the responses. According to three (21%) of the responses, realtors should be responsible for land sales, at the discretion of the park owner.

c). **What has been the recent average selling price per acre of land in the park?**

Serviced Land $9,617.65
(34 responses)
Range: $2,000 - $32,500

Unserviced Land $3,687.50
(8 responses)
Range: $2,000 - $5,500

Price for Serviced Land		Price for Unserviced Land	
$2,000 - $5,500	17 (50%)	$2,000 - $3,000	4 (50%)
$6,000 - $10,500	7 (20%)	$3,100 - $4,000	1 (12.5%)
$11,000 - $20,500	6 (18%)	$4,100 - $6,000	3 (37.5%)
$21,000 - $35,000	4 (12%)		

In both absolute and percentage terms, the sale price for 50% of the serviced land is between $2,000 - $5,500. In the case of unserviced land 50% sells for between $2,000 - $3,000. Considering that the average development cost for land, roads, and services is about $31,400/acre in most cases, only one park (Oromocto) appears to be recovering the development cost of park land.

d). **What percentage of revenues from land sales should be apportioned to:** (37 responses)

Province _____% Municipality _____% Commission _____%
Realtors _____% Other (Please Specify) _____%

The allocation of revenues from land sales relates directly to the owner of the park. That is, if a park is owned by a municipality, then a large portion, if not all, should go to the municipality. The same logic applies to those parks that are owned by the Province. Distributing revenues from land sales becomes delicate when there is joint ownership or joint administration. The proposed allocation of revenues from land sales followed this breakdown:

9	**Province**
26	**Municipality**
14	**Commissions**
4	**Realtors**
4	**Other**

The majority of responses indicated that the park officials feel that revenues from land sales should be apportioned according to relative capital investment and services rendered.

e). **How should revenues from land sales be used?** (26 responses)

Most responses indicated that park officials feel revenues should be used to finance further park development. The majority of responses indicated revenues should be spent within the following ranges:

Promotion	**10 - 20%**
New Land Acquisition	**21 - 40%**
Infrastructure Improvements	**40 - 70%**
Administration	**10 - 20%**

A few respondents suggested that part or all of revenues should simply go to General Revenue.

Infrastructure improvements and, if development pressures warranted, new land acquisition were the two major replies to this question. The percentage that should be apportioned to each varied, as indicated in the above ranges, depending on the particular situation in each park.

f). **Do you consider the price at which industrial land is currently being sold in your park too high or too low?** Please comment. (38 responses)

Price is:	**Fair**	**22 (58%)**
	Too Low	**15 (39%)**
	Too High	**1 (3%)**

Of the 38 who responded to this question, 22 (58%) feel that the price at which industrial land is sold is fair. Comments included "Just right considering the market access and quality of land. It is a fair price for this marketplace. "It is affordable for local business and it's a competitive advantage for national companies." Fifteen (39%) respondents felt that the price was too low, given the high development costs. Some of this group felt that the price was too low, but it had to be kept low to compete with the unincorporated areas - low land cost is used as an incentive to attract new business. Only 1 (3%) felt that the price was too high, and in this case it was as a result of the lot size (60' x 100').

g). **Do you consider the selling price of land a factor in successfully developing the park?** Please comment. (38 respondents)

Selling Price:	**A Factor**	**24 (63%)**
	Not a Factor	**14 (37%)**

Of the 38 responses to this question, 24 (63%) considered the selling price of land a factor in developing a park. Land must be reasonably priced to allow for initial development of the park. Also the price will determine how competitive the park can be on the market. Many felt that competition from undeveloped land in unincorporated areas, just outside the municipal boundaries, required that land in the park be priced low to attract industries.

The price of land was not considered to be a significant factor by 14 (37%) of those who answered the question. Compared to the overall costs of development (construction) land cost was a minor factor. Some felt the availability of water and sewer services and a good location were more important factors in developing the park.

h). **Do you feel that selling the land below development costs is or is not a significant factor in locating new business in the park?** Please Comment. (37 respondents)

Significant Factor	**25 (68%)**
Not a Significant Factor	**12 (32%)**

This question is closely related to the preceding question. The breakdown of the responses is thus very similar. Of the 37 responses to this question 25 (68%) felt that selling land below development costs was a significant factor in attracting new business to the park. Comments such as the following illustrate the reasons for selling land below development costs:

- If a developer was required to pay development costs, there would be no development.
- Most local entrepreneurs are not able to afford land at development costs.
- Selling the land below development costs is certainly a significant factor in attracting and locating new industries in the park.

- o It is an incentive to the entrepreneur.
- o If it was sold at development cost people will not buy it because they can buy adjacent property cheaper.

Selling land below development cost was not considered a significant factor by 12 (32%) of the 37 respondents.

Those who felt it was not a significant factor suggested that:

- o Land itself is not a significant factor in locating new businesses, location is more important.
- o No, we have to administer the park as a business in itself. The price (of land) is not a problem if you can justify it.

Development Outside Parks

15a). **Should the Department of Commerce and Technology support a project not located in an industrial park? Yes 26 (70%) No 11 (30%) If yes, under what circumstances?** (37 responses)

Based on park ownership, the breakdown for those that answered yes is as follows:

Municipalities	**17 (65%)**
Commission	**5 (19%)**
Province	**4 (15%)**

It should be noted that the commissions were essentially split on this question (5 for, 6 against).

Municipalities felt that a project located outside a park should be supported but with some conditions:

- With the consent of the municipality.
- Yes, but strongly encourage it to be in an industrial park.
- If it met the municipal zoning.
- If the park is full.
- Not all industries are right for industrial park locations. Sometimes, just their size will require a location outside of the park.

Commissions that favoured Commerce and Technology support felt that:

- A good project will remain a good project no matter where it is located.
- Some developments are not suited for an industrial park.

Eleven (30%) respondents felt that a project should not be supported if it is not in an industrial park.

Commission	**6 (55%)**
Municipality	**5 (45%)**

b). **Is industrial development outside the industrial park an impediment to development of your park?**

(I) **Inside the municipal boundaries** Yes 18 (47%) No 20 (53%) (38 responses)
(II) **outside the municipal boundaries** Yes 21 (54%) No 18 (46%) (39 responses)

The following breakdown of responses is based on park ownership.

Inside the Municipal Boundaries

Yes 18 (47%)		No 20 (53%)	
Municipalities	8	Municipalities	12
Commissions	4	Commissions	5
Province	6	Province	3

Industrial development occurring outside a park but within a municipality is often a result of other areas being available because they are zoned for industrial use. Those (47%) that felt development outside the park was not a problem were of the view that as long as the development occurred in the municipality it was contributing to the tax base and creating jobs. Additionally, they felt that it should be permitted outside the park only if it would not require additional infrastructure.

A serious impediment to the development of industrial parks is industry locating outside of municipal boundaries in the non-incorporated areas. The following breakdown indicates how the park owners view this issue.

Is Industrial Development outside the municipal boundaries an impediment to park development?

Yes 21 (54%)		No 18 (46%)	
Municipalities	13	Municipalities	8
Commissions	4	Commissions	7
Province	4	Province	3

The municipality has the most to lose if industrial development occurs outside rather than inside their boundaries. The Economic Commissions are essentially concerned with economic development generally, thus they may have no preference as to where industry locates as long as it is within their region. The provincially owned parks are split on this issue, which is a result of the fact that three of their parks are located in non-incorporated areas and the rest are in municipalities.

Comments:

- It is hard to compete with lower land cost and substantially lower tax rates in the unincorporated areas.
- The Province continues to allow industrial development in unincorporated areas. Regional planning is a necessity.
- It is difficult to direct development to any specific location unless there is universal zoning coverage that is strictly enforced. It is too easy for developers to get rezonings and in most cases developers end up locating where they choose.

Changes in Demand

16. Have you noted any changes in demand for the type of services required by industry in recent years?

The most frequent comments regarding changes in demand for services included:

Transportation: There has been a shift from rail to trucks. Air transportation for both passenger and freight is very important.

Water: Increasing need for an adequate supply of good quality water. Require enough pressure for fire protection.

Sewer: There is more concern now regarding waste disposal. There is a demand for treatment facilities to protect the environment. Lot sizes in some parks could be reduced if the park had a central sewage system.

Electrical: Most industries require three phase power.

Other: Smaller lots needed as opposed to the traditional large industrial lots in the parks. Businesses looking at locating in an area now considers the quality of life that its employees will enjoy.

Types of Use

17a). **Would it be appropriate to establish zones within the park that would be designated for particular types of activities (ie. a commercial/retail zone, light industrial zone, heavy industrial zone, service zone)?** (38 responses)

Yes 30 (79%)
No 8 (21%)

Comments may be summarized as follows:

Essentially most all parks are zoned light industrial, resulting in a mix of uses. It was felt by most respondents that zoning within the park was a good idea, but it is hard to do in established parks, and may only be suitable for large parks.

Industrial parks, in some instances, are becoming more commercial and business in nature. Possibly it is a good idea to try and separate traditional heavy industry from the commercial operations. The term "Industrial Park" in many instances gives a poor connotation, a "Business Park" with mixed development zones is more marketable.

Zones within a park are a luxury to be enjoyed if the park is large enough and can be selective of the industries it will permit in the park.

b). **Should the parks be limited to specific types of industry? Yes 25 (66%) No 13 (34%) What types?** (38 responses)

It was generally felt that parks should be limited to manufacturing, processing and wholesale trade type of industries. However, it was felt that it is possible to have light industrial activities with these heavy industries if the park is zoned properly. Any industry that is in a park should be environmentally safe. Limiting a park to specific types of industries is something most parks cannot afford to do.

c). **Have you had any requests for or interest expressed in the establishment of industrial malls, modular warehouses, or multi-tenant buildings in your park. Yes 24 No 18** (42 responses)

Note: Three parks had requests or interest expressed in more than one of the choices. Of the 24 "Yes" responses the requests were as follows:

Industrial Malls	**9 (37.5%)**
Multi-Tenant Buildings	**9 (37.5%)**
Incubator Malls	**7 (29%)**
Modular Warehouses	**2 (8%)**
Not Specified	**2 (8%)**

If yes, should this be provided by the:

Private Sector 16 (67%) Public Sector 6 (25%) Both 2 (8%)

The majority (67%) of respondents felt that such types of developments should be private sector initiatives. Real estate development such as these respond to the market and thus do

not require public subsidy. Nor should the government be erecting buildings in competition with the public sector.

A quarter (25%) of the respondents felt that these types of developments should be provided by the public sector, ie. provincially funded with municipal assistance and administration. Public sector needs to initiate these types of ventures.

A small portion (8%) of the respondents felt that there should be a combination of private and public sector involvement. Let government do the infrastructure. Let the private sector do the building since most malls operate at a loss for three to five years, therefore, should be subsidized by the public sector, ie. private sector development with public sector assistance.

Attracting Tenants

18. **What do you feel attracts tenants to your park?** (43 responses)

Location 31 (72%) **Park Design** 10 (23%) **Land Cost** 36 (84%)
Land Availability 20 (47%) **Services** 27 (63%) **Zoning** 19 (44%)
Other (Please Specify) 11 (23%)

The category "other" included such things as:

- confidence in the future of the town;
- port facilities;
- quality of life in the community; and
- access to transportation system.

19. **If you have lost potential tenants, where have you lost them to and what do you feel was the reason for them locating elsewhere?** (4 responses)

For the most part, if a potential tenant was lost, it was lost to a nearby industrial park that had been previously serviced and had buildings available. Potential tenants were also lost to the outlying areas adjacent to the park. Two of the responses referred to political decisions such as the tenants being steered to parks owned by the Province.

Benefits to Community

20. **Please identify the nature and extent of the benefits that have accrued to the community as a result of your industrial park.** (36 responses) Note: in some cases a respondent identified more than one kind of benefit.

Economic Benefits identified were dominated by traditional measurements such as:

Creation of Jobs	**27 (75%)**
Tax Base	**22 (61%)**
Multiplier Effect	**8 (22%)**
Diversification of Economy	**5 (14%)**
Major Capital Expenditures	**3 (8%)**
Place For Business	**3 (8%)**
Trained Labour Force	**2 (6%)**
Retain Community Population	**2 (6%)**
Housing	**2 (6%)**
Transportation	**2 (6%)**

The economic benefits associated with housing and transportation are related to an increase in the municipal tax base resulting in positive changes to these two items.

Social Benefits (22 responses) These benefits are closely related to economic benefits that occur to the community as a result of increased economic activities. Strengthening of the municipal tax base has resulted in social benefits for the community.

Employment of the Population	**7 (32%)**
Centralized Industrial Activities	**5 (23%)**
Improved Quality of Life	**5 (23%)**
Development of the Community	**4 (18%)**
Increased Infrastructure Improvements	**3 (14%)**
Schools	**2 (9%)**
Education	**2 (9%)**
Increased Buying Power	**1 (5%)**
Provides Opportunities for Growth	**1 (5%)**
Tax Base Increase/Diversified	**1 (5%)**
Availability of Services	**1 (5%)**

Environmental Benefits (17 responses) Industrial parks were seen as a means to protect the environment or at least mitigate environmental damage by industries.

Control Industrial Development	**11 (61%)**
Central Location for Industry	**3 (17%)**
Provide Service Area for Industry	**3 (17%)**
Aesthetics	**1 (6%)**

Essentially, industrial parks were seen as one central location where industry can locate and their servicing needs can be met, thus reducing the potential damage to the environment.

Other Benefits, please specify. Other benefits of industrial parks included:

- Provides an area for industrial development that is removed from residential development.
- Reduces re-zonings and other related zoning problems.
- Provides a focus for future industrial development within a municipality. Depending on the location of the park, it may reduce truck traffic in a municipality.

Improving Provincial Role

21. **Do you have any suggestions on how the role of the Province could be made more effective regarding industrial park development?**

Of the 32 responses received to this question, 24 (75%) suggested that "the province should have a financial assistance program to assist park owners in developing infrastructure including streets, lighting, water and sewer. Also the province should concentrate its financial assistance for infrastructure in those parks that have definite development potential.

To alleviate the problems associated with industrial development in unincorporated areas at the expense of a nearby municipality, others suggested that the province should only support a project in a park within a municipality.

It was also suggested that the province has a role to play as an educator, that is, to educate municipalities about industrial park development. This could be achieved through seminars, or more directly, have Business Development Officers across the province to work with the municipalities on the development of their industrial parks.

General Comments

Industrial parks should be looked at as an investment in the future. They played an important part in the past and will continue to do so in the future.

Emphasis should now be put on the land use and environmental benefits of locating industries in central areas.

The planning function of parks should be our number one priority.

Having available industrial land is a must.

Having available industrial land is surely an asset.

The availability of a building often acts as a greater enticement than land alone.
Naked land and serviced land does not always engender the same interest by entrepreneurs as does an available building or space in a building.

The Moncton area has the most successful parks in New Brunswick yet there seems to be a lack of appreciation for investing in what works.

In much of the province, the primary clientele of the park is local business, the province should recognize and accept this.

A few good industries in a small municipality could make us more self-sufficient. Also more money should be available for infrastructure, as the costs are far too high for our small budgets.

The industrial commissions are too generic and do not have a focus or concentrated effort, nor are they aggressive enough.

APPENDIX B

INDUSTRIAL PARK QUESTIONNAIRE

INDUSTRIAL PARK QUESTIONNAIRE

The purpose of this questionnaire is to obtain specific information and opinions on issues related to industrial park development in New Brunswick. The information collected from this survey will complement the information collected through the questionnaire that was sent out by the Department of Commerce and Technology during May - June 1990. The intent of this research is to facilitate the formulation of planning and policy recommendations for the Department with regard to industrial park development.

A. Current Park Status

1. What is the name of your industrial park? _____

2. Where is it located? _____

3. Who owns the park? Province _____ Economic Development Commission _____
Municipality _____ Other _____

4a). Who is responsible for the administration of the Park?

Name: _____

Title: _____

Department: _____

b). How many employees are involved in administration of the Park?

Number of Employees _____ Person-Years/Year _____

5a). Please indicate:

Total Acreage in Park _____ Total Acres Presently Occupied _____

b). Indicate the approximate land area (acreage) serviced with the following:

	Connected To Municipal System	Internal Park System	Individual Lot (Well/ Septic System)	Treatment System
Water	_____	_____	_____	_____
Sewer	_____	_____	_____	_____

6. Do you have or foresee (within 5 years) any problems with:

a). Water Supply Yes _____ No _____

If yes, please specify. _____

_____

b). Water System Yes _____ No _____

If yes, please specify. _____

_____

c). Sewer System Yes _____ No _____

If yes, please specify. _____

_____

d). Sewage Treatment Yes _____ No _____

If yes, please specify. _____

_____

7. What is the rated capacity of:

a). Water System: _____

_____

b). Sewage System: _____

_____

8a). Indicate the total number of kilometres of each type of road surface and drainage characteristics.

Road Surface	Curb & Gutter	Storm Sewer	Ditch
Asphalt	_____km	_____km	_____km
Chip Seal	_____km	_____km	_____km
Gravel	_____km	_____km	_____km

b). What type of road upgrading is required within the next 5 years? Please comment.

_____

_____

9. What type of electrical services are provided?

Underground _____ Overhead _____ Three Phase _____

Maximum Voltage Available _____

Specify any upgrading required over the next 5 years. Please comment.

_____

_____

10. Is your park governed by by-laws, regulations or covenants? Yes ____ No ____

If yes, please include a copy with completed questionnaire and check off the following if included in the regulations.

Setbacks	____	Parking	____	Building Aesthetics	____
Side/Rear Yard	____	Loading	____	Other	____
Outdoor Storage	____	Landscaping	____		

Park Performance

11a). What criteria do you use to measure the success of your park?

_____

_____

_____

b). Based on these criteria how would you rate the performance of your park, please provide rationale or elaboration.

_____

_____

_____

c). Do you have any suggestions regarding how park performance might be improved in the future?

_____

_____

Promotion

12a). What methods of park promotion do you currently use?

Brochures _____ Magazines _____ News Media _____

Trade Publications _____ Trade Shows/Conventions _____

Other (Please Specify) _____

If available, please include a sample of the promotion kit that you are currently using (brochures, fact sheets, and site plans).

b). Do you have any suggestions on how promotion of parks could be improved?

_____

_____

c). Who else should be promoting parks?

_____

_____

Administration

13a). Who can best administer industrial parks?

Province _____ Municipality _____ Economic Development Commissions_____
Private Sector _____ Other (Please Specify) _____

Comment: _____

_____

b). What is the average annual budget breakdown for your park?

Capital Expenditures (land acquisition and development)	$_____
Operations & Maintenance (Administration, Promotion, Etc.)	$_____
TOTAL	$_____

c). What do you estimate your current development costs per acre are for new park construction?

$_____/acre for land
$_____/acre for roads
$_____/acre for services
$_____/acre Total

d). Who should provide funding for the development of industrial parks?

Province _____ Municipality _____ Commission _____
Tenant _____ Other (Please Specify) _____

Comment: _____

_____

Land Sales

14a). Who is responsible for land sales in your industrial park?

Province _____ Municipality _____ Commission _____
Realtors _____ Other (Please Specify) _____

b). Do you feel someone else should be responsible for land sales? Who?

Province _____ Municipality _____ Commission _____
Realtors _____ Other (Please Specify) _____

Comment: _____

_____

c). What has been the recent average selling price per acre of land in the park?

Serviced Land $_____ Unserviced Land $_____

d). What percentage of revenues from land sales should be apportioned to:

Province _____% Municipality _____% Commission _____%
Realtors _____% Other (Please Specify) _____%

Comment: _____

_____

e). How should revenues from land sales be used?

_____% Promotion _____% Infrastructure Improvement
_____% New Land Acquisition _____% Administration
_____% General Revenues _____% Other (Please Specify) _____

Comment: _____

_____

f). Do you consider the price at which industrial land is currently being sold in your park too high or too low? Please comment.

_____

_____

_____

g). Do you consider the selling price of land a factor in successfully developing the park? Please comment.

_____

_____

_____

h). Do you feel that selling the land below development costs is or is not a significant factor in locating new business in the park? Please comment.

_____

_____

_____

Development Outside Parks

15a). Should the Department of Commerce and Technology support a project not located in an industrial park? Yes _____ No _____ If yes, under what circumstances?

_____

_____

b). Is industrial development outside the industrial park an impediment to development of your park?

(i) inside the municipal boundaries Yes ____ No ____

(ii) outside the municipal boundaries Yes ____ No ____

Please Elaborate _____

_____

_____

Changes in Demand

16. Have you noted any changes in demand for the type of services required by industry in recent years? Please comment.

___ Transportation _____

___ Water _____

___ Sewer _____

___ Electrical _____

___ Other _____

Types of Use

17a). Would it be appropriate to establish zones within the park that would be designated for particular types of activities (ie. a commercial/retail zone, light industrial zone, heavy industrial zone, service zone)?

_____

_____

b). Should the parks be limited to specific types of industry? Yes _____ No _____ What types?

_____

_____

c). Have you had any requests for or interest expressed in the establishment of industrial malls, modular warehouses, or multi-tenant buildings in your park? Yes ____ No ____

Specify which: _____

If yes, should this be provided by the:

Private Sector _____ Public Sector _____

Comment _____

_____

Attracting Tenants

18. What do you feel attracts tenants to your park?

Location _____ Park Design _____ Land Cost _____
Land Availability _____ Services _____ Zoning _____
Other (Please Specify) _____

19. If you have lost potential tenants, where have you lost them to and what do you feel was the reason for them locating elsewhere?

_____

_____

Benefits to Community

20. Please identify the nature and extent of the benefits that have accrued to the community as a result of your industrial park.

Economic Benefits _____

_____

_____

_____

Social Benefits _____

_____

_____

_____

Environmental Benefits _____

_____

_____

_____

Other Benefits, Please Specify _____

_____

_____

_____

Improving Provincial Role

21. Do you have any suggestions on how the role of the Province could be made more effective regarding industrial park development?

_____

_____

_____

General Comments

_____

_____

_____

_____

_____

_____

Thank you for providing this information, please return the completed questionnaire as soon as possible. If you have any questions please contact:

Mr. Ellis Jagoe
Flander-Good Associates Ltd.
(506) 458-8455

APPENDIX C

PARK PROFILES

ATHOLVILLE INDUSTRIAL PARK

NO QUESTIONNAIRE RECEIVED

LOCATION: Located off of Route 134 in the Village of Atholville, near the village boundary

OWNER: Municipality

AGENT: Raymond Legace, Mayor

PARK STATISTICS: Total Size _____acre(s) Total Occupied _____acre(s)
Occupancy 100 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power	X		

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	_____	Building Aesthetics	_____
Parking	_____	Side/Rear Yard	_____
Loading	_____	Landscaping	_____
Other	_____	Outdoor Storage	_____

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses: Running out of available land.

Park Strengths: Potential for expansion to adjacent land (16 acres to the east) near pulp mill. Industrial mall is successful at attracting local entrepreneurs.

I.D. #1

[1]Recent estimates

BAS CARAQUET INDUSTRIAL PARK

LOCATION: Village of Bas Caraquet

OWNER: Economic Development Commission

AGENT: Mr. Gerard Brideau, General Manager

PARK STATISTICS: Total Size 29 acre(s) Total Occupied 19 acre(s)
Occupancy 66 %

COMPANY STATISTICS: Number Of Businesses 6 Approximate Employment 225

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,502,800.00[1] Total Annual Property Taxes $61,786.00 [1]

GENERAL COMMENTS:

Park Weaknesses: Will require asphalt upgrading within the next five years. Transportation in this area not adequate for small manufacturers.

Park Strengths: No foreseeable problems with water supply or sewage systems. No electrical upgrading required over the next five years.

I.D. #2

[1]Recent estimates

BATHURST FOREST COMPLEX

NO QUESTIONNAIRE RECEIVED

LOCATION: Southwest of Bathurst adjacent to highway 430

OWNER: Department of Commerce & Technology

AGENT: John Moore, Manager Engineering Services

PARK STATISTICS: Total Size 860 acre(s) Total Occupied _____acre(s)
Occupancy _____%

COMPANY STATISTICS: Number Of Businesses 1 Approximate Employment 30 - 45

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water		X	
Sewer		X	
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses: Poor land sales (only one tenant in park a sawmill operated on a seasonal basis by Stone Consolidated). No other prospective tenant interest. Rural location.

Park Strengths: Sophisticated water and sewer system.

I.D. #3

[1]Recent estimates

BATHURST INDUSTRIAL PARK

LOCATION: East Bathurst, NB

OWNER: Economic Development Commission

AGENT: Donald Bishop, General Manager, CRDC

PARK STATISTICS: Total Size 173 acre(s) Total Occupied 75 acre(s)
Occupancy 43 %

COMPANY STATISTICS: Number Of Businesses 16 Approximate Employment 387

PRICE OF LAND: Serviced $18,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power	X	X	X

Maximum KV available 69

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $6,468,700.00[1] Total Annual Property Taxes $279,392.00[1]

GENERAL COMMENTS:

Park Weaknesses:

Park Strengths: No forseen water, sewer, or electrical problems over the next five years. Land available for new industries.

I.D. #4

[1]Recent estimates

BELLEDUNE INDUSTRIAL PARK

LOCATION: Belledune, NB

OWNER: Municipality

AGENT: Don, McAlister, Clerk/Treasurer, Administration

PARK STATISTICS: Total Size 67 acre(s) Total Occupied NEW acre(s)
Occupancy _____%

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			X
Sewer			X

	Asphalt	Gravel	Chip Seal
Roads		X	

	Overhead	Underground	Three Phase
Power			X

Maximum KV available .6

COVENANTS, BY-LAWS, & REGULATIONS: Being developed

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Being developed

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____ Total Annual Property Taxes $_____

GENERAL COMMENTS: Park is still being developed.

Park Weaknesses:

Park Strengths:

I.D. #5

*Recent Estimates

BERESFORD MUNICIPAL PARK

LOCATION: Beresford, adjacent to Highway 11

OWNER: Municipality

AGENT: Norval Godin

PARK STATISTICS: Total Size 42 acre(s) Total Occupied 15 acre(s)
Occupancy 36 %

COMPANY STATISTICS: Number Of Businesses 4 Approximate Employment 55

PRICE OF LAND: Serviced $6,000 /acre Unserviced $3,000 /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			X
Sewer			X

	Asphalt	Gravel	Chip Seal
Roads		X	X

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available 35

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes ____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $367,200.00 [1] Total Annual Property Taxes $14,885.00 [1]

GENERAL COMMENTS:

Park Weaknesses: Not a large volume of water. All septic tanks that may become a problem at a later date. Need to upgrade roads in phase I and pave streets.

Park Strengths: Approximately 27 acres available for development.

I.D. #6

[1]Recent estimates

BOUCTOUCHE INDUSTRIAL PARK

LOCATION: Irving Boulevard West, Bouctouche

OWNER: Economic Development Commission

AGENT: Jean-Guy Dube, General Manager Kent Economic Commission

PARK STATISTICS: Total Size 108.8 acre(s) Total Occupied 16.5 acre(s)
Occupancy 15 %

COMPANY STATISTICS: Number Of Businesses 8 [1] Approximate Employment 34-46 [1]

PRICE OF LAND: Serviced $4,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water		X	
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads			X

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $49,900.00 [2] Total Annual Property Taxes $1,818.00 [2]

GENERAL COMMENTS:

Park Weaknesses: To accommodate industries who require a lot of water the park should be connected to the municipal system. The park sewer system needs more acreage. The municipal sewage treatment needs to be improved. Within the next five years extension of asphalt base, seal, curb and gutter, storm sewer, and ditch will be required.

Park Strengths:

I.D. #7

[1] Study team estimates based on incomplete data
[2] Recent estimates

CAMPBELLTON INDUSTRIAL PARK[1]

LOCATION: Intersection of Village Avenue and Lily Lake Road, off Centennial Drive

OWNER: Municipality

AGENT: Adrien Allard, President Economic Development Commission

PARK STATISTICS: Total Size 15 acre(s) Total Occupied 3 acre(s)
Occupancy 20 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads		X	
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 12

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking	X	Side/Rear Yard	X
Loading		Landscaping	X
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[2] Total Annual Property Taxes $_____[2]

GENERAL COMMENTS:

Park Weaknesses: Within the next five years additional service main required beyond the initial five acres presently serviced for water and sewer system. Also within the next five years chip seal and road extension construction. Electrical services will need to be extended if the road is. Development cost will be high due to the topography of the site.

Park Strengths: No foreseen problems with water supply or sewage treatment over the next five years.

I.D. #8

[1]Locally known as Centennial Industrial Park
[2]Recent estimates

CARAQUET INDUSTRIAL PARK

LOCATION: Off Blvd. St. Pierre East, Caraquet

OWNER: Economic Development Commission

AGENT: Gerard Brideau, General Manager

PARK STATISTICS: Total Size 81 acre(s) Total Occupied 37 acre(s)
Occupancy 46 %

COMPANY STATISTICS: Number Of Businesses 3 Approximate Employment 125

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power		X	X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other	X	Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $407,200.00 [1] Total Annual Property Taxes $16,233.00 [1]

GENERAL COMMENTS:

Park Weaknesses: Present water supply and water system are unable to supply additional demand. Sewage treatment system is not designed to treat industrial sewer waste. Construction of street extensions and additional water and sewage systems are also necessary.

Park Strengths:

I.D. #9

[1] Recent estimates

CALEDONIA INDUSTRIAL ESTATES

LOCATION: Moncton, NB

OWNER: Province

AGENT: Peter Belliveau, General Manager Moncton Industrial Development

PARK STATISTICS: Total Size 1520 acre(s) Total Occupied 350 acre(s)
Occupancy 23 %

COMPANY STATISTICS: Number Of Businesses 26 Approximate Employment 745

PRICE OF LAND: Serviced $19,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available 12

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $13,756,600.00[1] Total Annual Property Taxes $607,065.00*[1]

GENERAL COMMENTS:

Park Weaknesses: A new interchange with the Trans Canada Highway is urgently needed to open up the park.

Park Strengths: No foreseeable water or sewer problems over the next five years. A primary sewage plant is presently under construction. Power supplies in park are also anticipated to be adequate for the next five years. Large amount of serviced land available, with a new interchange, this park will enjoy access directly to the TCH. Location of park is its greatest strength.

I.D. #10

[1]Recent estimates

CHIPMAN INDUSTRIAL PARK

LOCATION: Main Street, Chipman

OWNER: Municipality

AGENT: William Davidson, Mayor Village of Chipman

PARK STATISTICS: Total Size 100 acre(s) Total Occupied 0 acre(s)
Occupancy 0 %

COMPANY STATISTICS: Number Of Businesses 0 Approximate Employment 0

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			X
Sewer			X

	Asphalt	Gravel	Chip Seal
Roads		X	

	Overhead	Underground	Three Phase
Power	X		

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses: Unoccupied.

Park Strengths: Lots of available land.

I.D. #11

[1]Recent estimates

CHAMPLAIN INDUSTRIAL PARK

LOCATION: Bayside, near St. Andrews

OWNER: Province

AGENT: Mr. Scott Gibson, Director Operations Department of Supply & Services

PARK STATISTICS: Total Size 580 acre(s) Total Occupied 65 acre(s)
Occupancy 11 %

COMPANY STATISTICS: Number Of Businesses 7 [1] Approximate Employment 40 - 45 [1]

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water		X	
Sewer		X	X

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $4,455,500.00[2] Total Annual Property Taxes $144,318.00 [2]

GENERAL COMMENTS:

Park Weaknesses: Not a large water supply available. The water system and sewer treatment and sewage system need to be extended to service more land. The gravel road requires upgrading to open up new land.

Park Strengths: With the recent port development in this area more interest is being shown in this park. There is adequate land available to accommodate demand.

I.D. #12

[1]Study team estimate based on incomplete data
[2]Recent estimates

CHATHAM INDUSTRIAL PARK

LOCATION: Chatham, NB

OWNER: Economic Development Commission

AGENT: D. P. Black, General Manager Miramichi Region Development Corporation

PARK STATISTICS: Total Size 160 acre(s) Total Occupied 23.64 acre(s)
Occupancy 15 %

COMPANY STATISTICS: Number Of Businesses 11 Approximate Employment 85

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power	X		

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,979,800.00[1] Total Annual Property Taxes $82,043.00[1]

GENERAL COMMENTS:

Park Weaknesses: Will require a new well soon.

Park Strengths: No foreseeable water or sewer problems within the next five years. No electrical upgrading anticipated over the next five years. Land available for future development. Remaining large lots have been subdivided to accommodate the needs of small and medium size industries.

I.D. #13

[1]Recent estimates

CLAIR INDUSTRIAL SITE

LOCATION: Clair, NB

OWNER: Municipality

AGENT: Rino Pelletier, General Manager Northwest Industrial Commission

PARK STATISTICS: Total Size 200 acre(s) Total Occupied 50 acre(s)
Occupancy 25 %

COMPANY STATISTICS: Number Of Businesses 3 [1] Approximate Employment 108-123 [1]

PRICE OF LAND: Serviced $3,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power			X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,116,500.00 [2] Total Annual Property Taxes $36,409.00 [2]

GENERAL COMMENTS:

Park Weaknesses:

Park Strengths: No expected water or sewer problems are expected for this park over the next five years.

I.D. #14

[1] Study team estimates based on incomplete data
[2] Recent estimates

DIEPPE INDUSTRIAL PARK

LOCATION: Within Town of Dieppe, East of Moncton

OWNER: Municipality

AGENT: Elie J. Richard, General Manager

PARK STATISTICS: Total Size 1100 acre(s) Total Occupied 400 acre(s)
Occupancy 36 %

COMPANY STATISTICS: Number Of Businesses 49 Approximate Employment 1,461-1,586

PRICE OF LAND: Serviced $18,500.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		X
	Overhead	**Underground**	**Three Phase**
Power	X	X	X

Maximum KV available 7.2

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $24,790,600.00[1] Total Annual Property Taxes $1,001,199.00[1]

GENERAL COMMENTS:

Park Weaknesses: Infrastructure needed within non-developed areas for water and sewer system, and roads.

Park Strengths: No foreseeable problems with water supply and sewage treatment. No electrical upgrading expected over the next five years. Good access to the T.C.H.

I.D. #15

[1]Recent estimates

FREDERICTON INDUSTRIAL PARK (OLD)

PARK FULLY OCCUPIED - NO QUESTIONNAIRE RECEIVED

LOCATION: Southeast part of Fredericton between Vanier Highway and Lincoln Road

OWNER: Municipality

AGENT: City of Fredericton

PARK STATISTICS: Total Size 157 acre(s) Total Occupied 155 acre(s)
Occupancy 99 %

COMPANY STATISTICS: Number Of Businesses 72[1] Approximate Employment 582-777[1]

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 12.47/7.2

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $25,334,900.00[2] Total Annual Property Taxes $968,381.00[2]

GENERAL COMMENTS:

Park Weaknesses: Fully occupied.

Park Strengths: Good location and rail access. Connected to Municipal water system.

I.D. #16a

[1]Study Team estimates based on incomplete data
[2]Recent estimates

FREDERICTON INDUSTRIAL PARK EXTENSION (DEVELOPED PRIVATELY)[1]

NO QUESTIONNAIRE RECEIVED

LOCATION: Southside of Vanier Highway, between Kimble and Doak Road, Fredericton

OWNER: Chippin's Limited Real Estate

AGENT: Joe Chippin

PARK STATISTICS: Total Size 189 acre(s) Total Occupied 38 acre(s)
Occupancy 20 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $35-45,000 /acre Unserviced $_____ /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 12.47/7.2

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $574,600.00 [2] Total Annual Property Taxes $21,039.55 [2]

GENERAL COMMENTS:

Park Weaknesses: Most land sold/committed.

Park Strengths: Park has a good location and rail access. Park is connected to the municipal water system.

I.D. #16b

[1]Locally known as Chippin's Industrial Subdivision
[2]Recent estimates

FUNDY AQUACULTURE PARK[1]

LOCATION: Fundy Bay Drive, St. George, NB

OWNER: Municipality

AGENT: Ross Norman, Town Manager, St. George

PARK STATISTICS: Total Size 40 acre(s) Total Occupied 22.9 acre(s)
Occupancy 57 %

COMPANY STATISTICS: Number Of Businesses 5 Approximate Employment 79-84

PRICE OF LAND: Serviced $7,500.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads		X	

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[2] Total Annual Property Taxes $_____[2]

GENERAL COMMENTS:

Park Weaknesses: There are foreseeable problems over the next five years with water supply and reservoir volume as several businesses are large water users. Will need to pave or chip seal roads within the park and extend the road to open new land. Extension of electrical services into new area will also be required.

Park Strengths: No expected problems with sewer system or sewage treatment facilities.

I.D. #17

[1]Locally known as St. George Aquaculture Service Centre
[2]Recent Estimates

GRAND FALLS REGIONAL INDUSTRIAL PARK

LOCATION: Town of Grand Falls, near intersection of routes 130 and 255

OWNER: Municipality

AGENT: Albert R. Godbout, Industrial Commissioner, Grand Falls Region Development Commission

PARK STATISTICS: Total Size 138 acre(s) Total Occupied 88 acre(s)
Occupancy 64 %

COMPANY STATISTICS: Number Of Businesses 8 [1] Approximate Employment 52-100 [1]

PRICE OF LAND: Serviced $7,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		X
Sewer	X		X

	Asphalt	Gravel	Chip Seal
Roads	X		

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available 69

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $2,036,700.00 [2] Total Annual Property Taxes $78,670.71 [2]

GENERAL COMMENTS:

Park Weaknesses: Water pressure in this park is a problem, the size of the pipes are not adequate. The sewage treatment facilities are not adequate for the park.

Park Strengths: No foreseeable water supply or sewer system problems over the next five years.

I.D. #18

[1] Study team estimates based on incomplete data
[2] Recent estimates

GRANDVIEW INDUSTRIAL PARK

LOCATION: Grandview Avenue and Old Black River Road, Saint John

OWNER: Municipality

AGENT: Mr. Don O'Leary, Department of Economic Development

PARK STATISTICS: Total Size 80 acre(s) Total Occupied 75 acre(s)
Occupancy 95 %

COMPANY STATISTICS: Number Of Businesses 100 Approximate Employment 450

PRICE OF LAND: Serviced $25,000 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power		X	

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS: NO

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR PARK TENANTS:

Total Assessed Value $15,880,400.00' Total Annual Property Taxes $736,851.00'

GENERAL COMMENTS:

Park Weaknesses: Water pressure not sufficient for fire sprinklers. Water pipes deteriorating. Could use upgrading of electrical facilities. Park is nearing full capacity.

Park Strengths: Does not require any sewer system or sewer treatment upgrading within the next five years. No road upgrading needed over the next five years other than regular maintenance. This park is most successful in area.

I.D. #19

'Recent estimates

HARTLAND INDUSTRIAL PARK

LOCATION: McLean Avenue, mid-western part of Town of Hartland

OWNER: Municipality

AGENT: Malcolm Clendenning, Deputy Mayor

PARK STATISTICS: Total Size 75 acre(s) Total Occupied 65 acre(s)
Occupancy 87 %

COMPANY STATISTICS: Number Of Businesses 11 Approximate Employment 209-244

PRICE OF LAND: Serviced $3,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		X
	Overhead	**Underground**	**Three Phase**
Power	X	X	X

Maximum KV available 6

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $4,014,100.00[1] Total Annual Property Taxes $165,163.00[1]

GENERAL COMMENTS:

Park Weaknesses: Land acquisition is a must. Additional reservoir is also required. Access to park is obtained by going through the town.

Park Strengths: No foreseeable water supply, sewer system, or sewage treatment problems over the next five years.

I.D. #20

[1]Recent estimates

LAMEQUE INDUSTRIAL PARK

LOCATION: Lameque, NB

OWNER: Economic Development Commission

AGENT: Gerard Brideau, General Manager

PARK STATISTICS: Total Size 8.19 acre(s) Total Occupied 1.54[1] acre(s)
Occupancy 19 %

COMPANY STATISTICS: Number Of Businesses 0 Approximate Employment 0

PRICE OF LAND: Serviced $_____/acre Unserviced $2,000.00 /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			
Sewer			
	Asphalt	**Gravel**	**Chip Seal**
Roads		X	
	Overhead	**Underground**	**Three Phase**
Power	X		

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[2] Total Annual Property Taxes $_____[2]

GENERAL COMMENTS:

Park Weaknesses: Haven't sold land in years. Poor water quality. The park should be connected to the town sewer system.

Park Strengths:

I.D. #21

[1]Land sold but vacant
[2]Recent estimates

LORNEVILLE INDUSTRIAL SITE

LOCATION: 20 km SW of Saint John, Highway #1 South

OWNER: Province

AGENT: Al Lacy, Minister Department of Commerce & Technology

PARK STATISTICS: Total Size 1400 acre(s) Total Occupied 200 acre(s)
Occupancy 14 %

COMPANY STATISTICS: Number Of Businesses 1 [1] Approximate Employment 200 [1]

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			X
Sewer			X

	Asphalt	Gravel	Chip Seal
Roads			X

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS: City of Saint John By-Laws

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other	X	Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[2] Total Annual Property Taxes $_____[2]

GENERAL COMMENTS:

Park Weaknesses: There is not water or sewage system in this park. Also, there is no sewage treatment facility. If sites are sold this park will require the above mentioned as well as electricity facilities. The lack of promotion in this park has led to its lack of land sales.

Park Strengths: Lots of land available.

I.D. #22

[1] Study team estimates based on incomplete data
[2] Recent Estimates

MADAWASKA REGIONAL INDUSTRIAL PARK

LOCATION: Saint-Hilaire, NB

OWNER: Economic Development Commission

AGENT: Rino Pelletier, General Manager Northwest Industrial Commission

PARK STATISTICS: Total Size 150 acre(s) Total Occupied 10 acre(s)
Occupancy 7 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power			X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____' Total Annual Property Taxes $_____'

GENERAL COMMENTS:

Park Weaknesses: Poor land sales. Water supplies are minimal.

Park Strengths: No expected water or sewer system problems over the next five year period.

I.D. #23

'Recent Estimates

MCADAM INDUSTRIAL PARK

LOCATION: McAdam, NB

OWNER: Municipality

AGENT: Ralph Annis, Mayor Village of McAdam

PARK STATISTICS: Total Size 24 acre(s) Total Occupied 8 acre(s)
Occupancy 33 %

COMPANY STATISTICS: Number Of Businesses 3 [1] Approximate Employment 24 [1]

PRICE OF LAND: Serviced $4,500.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 6

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking		Side/Rear Yard	X
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $260,800.00 [2] Total Annual Property Taxes $8,435.00 [2]

GENERAL COMMENTS:

Park Weaknesses: Sewage system is now at capacity.

Park Strengths: This park has no foreseeable water or sewer systems problems for the next five year period. There is also no expected road or electrical upgrading required.

I.D. #24

[1]Study team estimates based on incomplete data
[2]Recent Estimates

MCALLISTER INDUSTRIAL PARK

LOCATION: Old Black River Road, East Saint John

OWNER: Province

AGENT: Don O'Leary, Director Department of Economic Development, City of Saint John

PARK STATISTICS: Total Size 1500 acre(s) Total Occupied 25 acre(s)
Occupancy 2 %

COMPANY STATISTICS: Number Of Businesses 10 Approximate Employment 120

PRICE OF LAND: Serviced $13,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power	X	X	

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $4,452,800.00[1] Total Annual Property Taxes $206,610.00 [1]

GENERAL COMMENTS:

Park Weaknesses: The serviced property is hilly and requires a great deal of site development. Major electrical up-grading is required as the electrical capacity may restrict the type of businesses able to locate in this park. Topographical constraints to development.

Park Strengths: No expected problems with the water or sewer systems.

I.D. #25

[1]Recent estimates

MINTO INDUSTRIAL PARK

LOCATION: Minto, NB

OWNER: Province

AGENT: Scott Gibson, Director of Operations Department of Supply & Services

PARK STATISTICS: Total Size 600 acre(s) Total Occupied 86 acre(s)
Occupancy 14 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $2,000.00 /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water		X	
Sewer		X	

	Asphalt	Gravel	Chip Seal
Roads	X		

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,861,400.00[1] Total Annual Property Taxes $70,919.00[1]

GENERAL COMMENTS:

Park Weaknesses: Sewage treatment is now at its capacity. More land needs to be serviced with water system, and sewer system.

Park Strengths: Lots of available land.

I.D. #26

[1]Recent estimates

MIRAMICHI INDUSTRIAL PARK[1]

LOCATION: Newcastle, NB

OWNER: Economic Development Commission

AGENT: D. P. Black, General Manager, Miramichi Region Development Corporation

PARK STATISTICS: Total Size 152.44 acre(s) Total Occupied 60 acre(s)
Occupancy 39 %

COMPANY STATISTICS: Number Of Businesses 41 Approximate Employment 225

PRICE OF LAND: Serviced $8,500.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power	X		

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $4,334,600.00[2] Total Annual Property Taxes $175,839.00[2]

GENERAL COMMENTS:

Park Weaknesses: Running out of serviced land in this park. Some street paving is required as well as reconstruction of ditches. This park has a questionable water supply.

Park Strengths: No foreseeable problems with water and sewer systems within the next five years.

I.D. #27

[1]Locally known as Newcastle Industrial Park
[2]Recent estimates

MONCTON INDUSTRIAL PARK

LOCATION: Moncton, NB

OWNER: Province

AGENT: Peter Belliveau, General Manager Moncton Industrial Development Ltd.

PARK STATISTICS: Total Size 640 acre(s) Total Occupied 540 acre(s)
Occupancy 84 %

COMPANY STATISTICS: Number Of Businesses 94 Approximate Employment 2953

PRICE OF LAND: Serviced $22,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 12

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $59,856,300.00[1] Total Annual Property Taxes $2,641,320.00[1]

GENERAL COMMENTS:

Park Weaknesses: Running out of park owned land.

Park Strengths: No foreseen water or sewer problems over the next five years. No electrical upgrading expected to be required within the next five years. Considered one, if not the most, successful industrial parks in the Province.

I.D. #28

[1]Recent estimates

NACKAWIC INDUSTRIAL PARK

LOCATION: Nackawic, NB

OWNER: Municipality

AGENT: Bill MacLean, Town Manager Town of Nackawic

PARK STATISTICS: Total Size 32 acre(s) Total Occupied 24 acre(s)
Occupancy 75 %

COMPANY STATISTICS: Number Of Businesses 10 Approximate Employment 54-62

PRICE OF LAND: Serviced $2,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	X

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking		Side/Rear Yard	X
Loading		Landscaping	
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $18,927,900.00[1] Total Annual Property Taxes $743,488.00[1]

GENERAL COMMENTS:

Park Weaknesses: This park will require upgrading of electrical services for new industries establishing in the park. The sewer system needs to be extended to service the entire park, The sewage treatment facilities are underdesigned and presently non-functional. Park requires upgrading of paving, storm sewer and general expansion of the park. Also nearing the end of park owned land. Water quality is also a concern.

Park Strengths: Water services are being expanded to service the entire park.

I.D. #29

[1]Recent estimates

NASHWAAKSIS INDUSTRIAL SITE

NO QUESTIONNAIRE RECEIVED

LOCATION: Between Ring Road and Sunset Drive, Fredericton North

OWNER: Municipality

AGENT:

PARK STATISTICS: Total Size _____acre(s) Total Occupied _____acre(s)
Occupancy _____%

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES: Municipal Internal Individual Lot

TO BE REZONED

RESIDENTIAL

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks _____ Building Aesthetics _____
Parking _____ Side/Rear Yard _____
Loading _____ Landscaping _____
Other _____ Outdoor Storage _____

PARK BROCHURES AVAILABLE: Yes _____ No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses:

Park Strengths:

I.D. #30

[1]Recent estimates

OROMOCTO WEST INDUSTRIAL PARK

LOCATION: Oromocto, NB

OWNER: Municipality

AGENT: Mr. Wayne Carnell & Town of Oromocto staff

PARK STATISTICS: Total Size 48.35 acre(s) Total Occupied 34.22 acre(s)
Occupancy 71 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $32,500.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water		X	X
Sewer		X	

	Asphalt	Gravel	Chip Seal
Roads	X		

	Overhead	Underground	Three Phase
Power	X	X	X

Maximum KV available .6

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses: Fully occupied.

Park Strengths: No foreseeable water, sewer or road problems within the next five years.

I.D. #31

[1]Recent estimates

OROMOCTO EAST INDUSTRIAL PARK

LOCATION: Oromocto, NB

OWNER: Municipality

AGENT: Mr. Wayne Carnell & Town of Oromocto staff

PARK STATISTICS: Total Size 32.88 acre(s) Total Occupied 17.92 acre(s)
Occupancy 55 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $13,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer		X	

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available .6

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses: Storm drainage should be established throughout the park.

Park Strengths: There are no expected water or sewer problems over the next five years.

I.D. #32

[1]Recent estimates

PETIT ROCHER MUNICIPAL PARK

LOCATION: Petit Rocher, NB

OWNER: Municipality

AGENT: Guy Clauette, Village Clerk

PARK STATISTICS: Total Size 25 acre(s) Total Occupied 5 acre(s)
Occupancy 20 %

COMPANY STATISTICS: Number Of Businesses 2 [1] Approximate Employment 21 [1]

PRICE OF LAND: Serviced $____/acre Unserviced $3,000 - 5,000/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			X
Sewer			X

	Asphalt	Gravel	Chip Seal
Roads			X

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available 12

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes ____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $313,900.00 [2] Total Annual Property Taxes $12,641.00 [2]

GENERAL COMMENTS:

Park Weaknesses:

Park Strengths: No expected problems over the next five year period with water, sewer, or electrical services.

I.D. #33

[1]Study team estimates based on incomplete data
[2]Recent estimates

PERTH-ANDOVER INDUSTRIAL PARK

LOCATION: Perth-Andover, NB

OWNER: Municipality

AGENT: Murray E. Watters, Clerk Village office

PARK STATISTICS: Total Size 26 acre(s) Total Occupied 2 acre(s)
Occupancy 8 %

COMPANY STATISTICS: Number Of Businesses 2 [1] Approximate Employment 8 [1]

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X	X	
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 6.9

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $600.00 [2] Total Annual Property Taxes $14.00 [2]

GENERAL COMMENTS:

Park Weaknesses: This parks water and sewer costs to municipality are difficult to handle and still keep within budget.

Park Strengths:, There are no foreseen problems over the next five year period with the parks water supply or sewage treatment facilities.

I.D. #34

[1]Study team estimate based on incomplete data
[2]Recent estimates

REPUBLIC INDUSTRIAL SITE[1]

LOCATION: Edmundston, NB

OWNER: Municipality

AGENT: Rino Pelletier, General Manager Northwest Industrial Commission

PARK STATISTICS: Total Size 50 acre(s) Total Occupied 44 acre(s)
Occupancy 88 %

COMPANY STATISTICS: Number Of Businesses 15 Approximate Employment 192

PRICE OF LAND: Serviced $5-8,000.00/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power			X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $2,535,800.00[2] Total Annual Property Taxes $100,192.00[2]

GENERAL COMMENTS:

Park Weaknesses: Nearing land use capacity. The sewage treatment lagoon needs to be expanded.

Park Strengths: No expected problems with the parks water supply, water system, or sewer system, for the next five years. Have purchased additional land for park expansion.

I.D. #35

[1]Locally known as Edmundston Industrial Site.
[2]Recent estimates

RESTIGOUCHE INDUSTRIAL PARK

LOCATION: Route 11, Eel River Crossing, NB

OWNER: Economic Development Commission - R.I.C.

AGENT: Sadie Perron, Industrial Commissioner Industrial Park Committee

PARK STATISTICS: Total Size 400 acre(s) Total Occupied 10 acre(s)
Occupancy 3 %

COMPANY STATISTICS: Number Of Businesses 5 Approximate Employment 69

PRICE OF LAND: Serviced $10.500.00 /acre Unserviced $5.500.00 /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power			X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $807.000.00 [1] Total Annual Property Taxes $30.986.00 [1]

GENERAL COMMENTS:

Park Weaknesses: This park requires sewage treatment for phase I.

Park Strengths: For the next five year period there are no foreseen water supply, water system, or sewer system problems. The electrical services are not expected to need upgrading within this time frame either. This park has access directly to Route 11. There is plenty of land for development within the park.

I.D. #36

[1]Recent estimates

REXTON-RICHIBUCTO INDUSTRIAL PARK

LOCATION: Between Richibucto and Rexton, Kent County, NB

OWNER: Economic Development Commission

AGENT: Jean-Guy Dube, General Manager Kent Economic Commission Inc.

PARK STATISTICS: Total Size 90.7 acre(s) Total Occupied 5.3 acre(s)
Occupancy 6 %

COMPANY STATISTICS: Number Of Businesses 1 Approximate Employment 65-92

PRICE OF LAND: Serviced $4,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			X
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads		X	

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____.

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $347,700.00 [1] Total Annual Property Taxes $14,241.79 [1]

GENERAL COMMENTS:

Park Weaknesses: This park has poor quality water. Needs to be connected to municipal system (non existing). The sewer system needs to be extended to give access to more acreage.

Park Strengths: There are no foreseeable problems with the sewage treatment facility for the next five years.

I.D. #37

[1]Locally known as Richibucto-Rexton Industrial Park
[2]Recent estimates

SACKVILLE BUSINESS AND INDUSTRIAL PARK

LOCATION: Sackville, NB

OWNER: Municipality

AGENT: Roger A. Gerrard/Alan G. Mitchell Town of Sackville

PARK STATISTICS: Total Size 48 acre(s) Total Occupied 8.07 acre(s)
Occupancy 17 %

COMPANY STATISTICS: Number Of Businesses 9 Approximate Employment 16-24

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			
Sewer			

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available 32

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking	X	Side/Rear Yard	X
Loading		Landscaping	X
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses: Soil conditions and topography results in high development costs.

Park Strengths: No forseen water, sewer, electrical or road problems expected over the next five years.

I.D. #38

[1]Recent estimates

SCOUDOUC INDUSTRIAL PARK

LOCATION: Scoudouc, NB

OWNER: Province

AGENT: Scott Gibson, Director of Operations Department of Supply & Services

PARK STATISTICS: Total Size 645 acre(s) Total Occupied _____acre(s)
Occupancy _____%

COMPANY STATISTICS: Number Of Businesses 10 [1] Approximate Employment 544-879[1]

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			
Sewer			X

	Asphalt	Gravel	Chip Seal
Roads	X		

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $9,609,800.00[2] Total Annual Property Taxes $230,772.00[2]

GENERAL COMMENTS:

Park Weaknesses: This park needs a greater water supply. The water usage is at the limit of the process water pumping capacity and an enclosed reservoir is needed. The sewer system is old and in need of repair. The lagoon is overloaded and upgrading is necessary. Much of the asphalt surfaces of the park are also in need of repair. Direct access to the park is not provided from the TCH or route #15.

Park Strengths:

I.D. #39

[1]Study team estimates based on incomplete data
[2]Recent estimates

SHIPPIGAN INDUSTRIAL PARK

LOCATION: Shippigan, NB

OWNER: Economic Development Commission

AGENT: Gerard Brideau, General Manager

PARK STATISTICS: Total Size _____acre(s) Total Occupied _____acre(s)
Occupancy 100 %

COMPANY STATISTICS: Number Of Businesses 2 Approximate Employment 62

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			
Sewer			
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power			

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $22,000.00[1] Total Annual Property Taxes $922.00[1]

GENERAL COMMENTS:

Park Weaknesses: All park land has been sold and the park cannot be extended.[2]

Park Strengths:

I.D. #40

[1]Recent estimates
[2]Seeking environmental approval to expand the park

SPRUCE LAKE INDUSTRIAL PARK

LOCATION: Western boundary, City of Saint John, NB

OWNER: Province

AGENT: Don O'Leary, Director Department of Economic Development City of Saint John

PARK STATISTICS: Total Size 235 acre(s) Total Occupied 40 acre(s)
Occupancy 17 %

COMPANY STATISTICS: Number Of Businesses 17 Approximate Employment 246

PRICE OF LAND: Serviced $15,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power	X	X	

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other	X	Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $7,798,800.00[1] Total Annual Property Taxes $361,864.00[1]

GENERAL COMMENTS:

Park Weaknesses: If the park is to grow a new water supply and system are required as well as new sewer system and sewage treatment facilities. Within the next five years some road development with street lighting and curb and gutter are desirable.

Park Strengths: Steady improving land sales in 1989-90. The park tenants are preparing an open house, and their own promotion campaign. Approximately 200 acres available for development.

[1]Recent estimates

ST. JACQUES INDUSTRIAL PARK

LOCATION: Off Trout River Road, St. Jacques, NB

OWNER: Municipality

AGENT: Village Mayor and Council

PARK STATISTICS: Total Size 100 acre(s) Total Occupied 12 acre(s)
Occupancy 12 %

COMPANY STATISTICS: Number Of Businesses 6 Approximate Employment 87

PRICE OF LAND: Serviced $4,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,366,500.00[1] Total Annual Property Taxes $45,774.00[1]

GENERAL COMMENTS:

Park Weaknesses: Sewage treatment facility now at capacity.

Park Strengths: No foreseeable problems with water or sewer systems over the next five year period. Land available for development.

I.D. #42

[1]Recent estimates

SAINT-LEONARD INDUSTRIAL PARK

LOCATION: Industrial Park Street, St. Leonard, NB

OWNER: Municipality

AGENT: Jean-Yves Levesque, Administrator

PARK STATISTICS: Total Size 66 acre(s) Total Occupied 22 acre(s)
Occupancy 33 %

COMPANY STATISTICS: Number Of Businesses 6 Approximate Employment 103-130

PRICE OF LAND: Serviced $2,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X		
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available .6

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $548,200.00 [1] Total Annual Property Taxes $21,961.00 [1]

GENERAL COMMENTS:

Park Weaknesses: This park is lacking fire protection because of inadequate water pressure. The quality of water is poor. The sewer system and sewage treatment is almost at capacity with present industrial more industries would necessitate a larger lagoon.

Park Strengths: No foreseeable road or electrical upgrading required over the next five years.

I.D. #43

[1]Recent estimates

ST. STEPHEN INDUSTRIAL PARK

LOCATION: Church St., St. Stephen, NB

OWNER: Private Ownership

AGENT: N/A

PARK STATISTICS: Total Size 95 acre(s) Total Occupied 5 acre(s)
Occupancy 5 %

COMPANY STATISTICS: Number Of Businesses 1 Approximate Employment 250

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			
Sewer			
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $4,986,700.00[1] Total Annual Property Taxes $209,965.00[1]

GENERAL COMMENTS:

Park Weaknesses: If a large user of water locates here the sewage treatment does not have the needed capacity. All industrial land is privately owned and is not subdivided.

Park Strengths: No expected problems with water supply, and the water and sewer systems over the next five years.

I.D. #44

[1]Recent estimates

SUSSEX INDUSTRIAL PARK

LOCATION: Sussex, NB

OWNER: Municipality

AGENT: Bill Thompson, General Manager Fundy Region Development Commission

PARK STATISTICS: Total Size 197 acre(s) Total Occupied 94 acre(s)
Occupancy 48 %

COMPANY STATISTICS: Number Of Businesses 23 Approximate Employment 423-488

PRICE OF LAND: Serviced $9,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 12.47

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $5,630,900.00[1] Total Annual Property Taxes $218,699.00[1]

GENERAL COMMENTS:

Park Weaknesses: Require a new well to provide the needed water supply. The water system and sewer system need to be extended to provide additional serviced land. The present sewage treatment plant would need to be upgraded depending on the extent and quality of sewage that would be produced. Replacement of storm sewer system, curb and gutter, and asphalt replacement are also needed.

Park Strengths: Town has acquired more land adjacent to the park.

I.D. #45

[1]Recent estimates

TRACADIE INDUSTRIAL PARK

LOCATION: Route 11, Losier Settlement, NB

OWNER: Economic Development Commission

AGENT: Gerard Brideau, General Manager

PARK STATISTICS: Total Size 56 acre(s) Total Occupied 6 acre(s)
Occupancy 11 %

COMPANY STATISTICS: Number Of Businesses 5 [1] Approximate Employment 9 [1]

PRICE OF LAND: Serviced $_____/acre Unserviced $3,000.00 /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			X
Sewer			X

	Asphalt	Gravel	Chip Seal
Roads		X	

	Overhead	Underground	Three Phase
Power			X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other	X	Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $54,400.00 [1] Total Annual Property Taxes $1,380.00 [1]

GENERAL COMMENTS:

Park Weaknesses: Water system may require upgrading over the next five years. Park is essentially located on a swamp, very poor location.

Park Strengths: There are no foreseen problems with the water supply, sewer system or sewage treatment for the next five years.

I.D. #46

[1] Recent estimates

VANIER INDUSTRIAL PARK

LOCATION: Vanier Industrial Drive, Fredericton, NB

OWNER: Municipality

AGENT: Capital Region Development Commission and City of Fredericton Planning and Development Department

PARK STATISTICS: Total Size 101 acre(s) Total Occupied 18 acre(s)
Occupancy 18 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $21,000.00 /acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X	X	X
	Overhead	**Underground**	**Three Phase**
Power	X		

Maximum KV available 12.47/7.2

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	X
Parking		Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes X No _____

FOR EXISTING PARK TENANTS:

Total Assessed Value $6,236,700.00[1] Total Annual Property Taxes $249,335.00[1]

GENERAL COMMENTS:

Park Weaknesses: Low land sales. Location is perceived to be too far away from Fredericton proper.

Park Strengths: No expected water or sewer problems over the next five years. Plenty of land available.

I.D. #47

[1]Recent estimates

VICTORY INDUSTRIAL CENTER

LOCATION: Moncton, NB

OWNER: Canadian National Railway

AGENT: John Cameron, Manager of Atlantic Center Development, CNR

PARK STATISTICS: Total Size 100 acre(s) Total Occupied 90 acre(s)
Occupancy 90 %

COMPANY STATISTICS: Number Of Businesses _____ Approximate Employment _____

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads			
	Overhead	**Underground**	**Three Phase**
Power			

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes ____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $_____[1] Total Annual Property Taxes $_____[1]

GENERAL COMMENTS:

Park Weaknesses: The location of the park sewer line is a problem. All services need to be updated.

Park Strengths:

I.D. #48

[1]Recent Estimates

WESTMORLAND CHEMICAL PARK[1]

LOCATION: Dorchester Cape, NB

OWNER: Province

AGENT: John Moore, Manager Engineering Services, Commerce & Technology

PARK STATISTICS: Total Size 234 acre(s) Total Occupied 20 acre(s)
Occupancy 9 %

COMPANY STATISTICS: Number Of Businesses 1 [2] Approximate Employment 125-200[2]

PRICE OF LAND: Serviced $_____/acre Unserviced $_____/acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water			
Sewer			
	Asphalt	**Gravel**	**Chip Seal**
Roads		X	
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available _____

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks		Building Aesthetics	
Parking		Side/Rear Yard	
Loading		Landscaping	
Other		Outdoor Storage	

PARK BROCHURES AVAILABLE: Yes _____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,200.00 [3] Total Annual Property Taxes $29.00 [3]

GENERAL COMMENTS:

Park Weaknesses: Low land sales. Road access to park is impaired due to the height of a railway bridge over the main road to the park. Problems with the ownership of land in the park also exists.

Park Strengths:

I.D. #49

[1]Locally known as Dorchester Cape Industrial Park
[2]Study team estimates based on incomplete data
[3]Recent Estimates

WOODSTOCK INDUSTRIAL PARK

LOCATION: Phase I - Heller Road; Phase II - Trans Canada Highway

OWNER: Municipality .

AGENT: Ed Dickinson, Town Manager

PARK STATISTICS: Total Size 390 acre(s) Total Occupied 35 acre(s)
Occupancy 9 %

COMPANY STATISTICS: Number Of Businesses 13 Approximate Employment 183

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $5,000.00 /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		

	Asphalt	Gravel	Chip Seal
Roads	X	X	X

	Overhead	Underground	Three Phase
Power	X		X

Maximum KV available 124.7

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes ____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,831,500.00' Total Annual Property Taxes $66,216.00 '

GENERAL COMMENTS:

Park Weaknesses: The water supply has increasing manganese and hardness levels. Phase II requires septic tank installation - each lot requires approval.

Park Strengths: There are no foreseeable water system or sewer system problems within the next five year period.

I.D. #50

'Recent estimates

WOODSTOCK INDUSTRIAL PARK (PHASE I, PHASE II)

LOCATION: Phase I - Heller Road; Phase II - Trans Canada Highway

OWNER: Municipality

AGENT: Ed Dickinson, Town Manager

PARK STATISTICS: Total Size 390 acre(s) Total Occupied 35 acre(s)
Occupancy 9 %

COMPANY STATISTICS: Number Of Businesses 13 Approximate Employment 183

PRICE OF LAND: Serviced $5,000.00 /acre Unserviced $5,000.00 /acre

PARK SERVICES:

	Municipal	Internal	Individual Lot
Water	X		
Sewer	X		
	Asphalt	**Gravel**	**Chip Seal**
Roads	X	X	X
	Overhead	**Underground**	**Three Phase**
Power	X		X

Maximum KV available 124.7

COVENANTS, BY-LAWS, & REGULATIONS:

Setbacks	X	Building Aesthetics	
Parking	X	Side/Rear Yard	X
Loading	X	Landscaping	X
Other		Outdoor Storage	X

PARK BROCHURES AVAILABLE: Yes ____ No X

FOR EXISTING PARK TENANTS:

Total Assessed Value $1,831,500.00[1] Total Annual Property Taxes $66,216.00 [1]

GENERAL COMMENTS:

Park Weaknesses: The water supply has increasing manganese and hardness levels. Phase II requires septic tank installation - each lot requires approval.

Park Strengths: There are no foreseeable water system or sewer system problems within the next five year period.

I.D. #50 & 51

[1]Recent estimates

APPENDIX D

DATA COLLECTION OVERVIEW

APPENDIX D

DATA COLLECTION OVERVIEW

Respondents	Questionnaire C & T	Questionnaire FGA	Interviews	On-Site Inspection
1. Atholville Industrial Park			*	*
2. Bas Caraquet Industrial Park	*	*	*	*
3. Bathurst Forest Complex			*	
4. Bathurst Industrial Park	*	*	*	*
5. Belledune Industrial Park[1]		*	*	*
6. Beresford Industrial Park	*	*	*	*
7. Bouctouche Industrial Park	*	*		*
8. Campbellton Industrial Site		*	*	*
9. Caraquet Industrial Park	*	*		*
10. Caledonia Industrial Estates	*	*	*	*
11. Chipman Industrial Park	*	*		
12. Champlain Industrial Park	*	*	*	*
13. Chatham Industrial Park	*	*	*	*
14. Clair Industrial Park		*	*	
15. Dieppe Industrial Park	*	*	*	*
16. Fredericton Industrial Park	*			*
17. Fundy Aquaculture Park		*	*	*
18. Grand Falls Industrial Park		*		*
19. Grandview Industrial Park	*	*	*	
20. Hartland Industrial Park	*	*		*
21. Lameque Industrial Site	*	*	*	*
22. Lorneville Industrial Area		*	*	*
23. Madawaska Industrial Park		*	*	
24. McAdam Industrial Park	*	*	*	
25. McAllister Industrial Park	*	*	*	
26. Minto Industrial Park	*	*	*	
27. Miramichi Industrial Park	*	*	*	*
28. Moncton Industrial Park	*	*	*	*
29. Nackawic Industrial Park	*	*	*	*
30. Nashwaaksis Industrial Park			*	*

[1]Questionnaire data received after statistical results were compiled.

APPENDIX D

DATA COLLECTION OVERVIEW (Cont'd)

Respondents	Questionnaire C & T	Questionnaire FGA	Interviews	On-Site Inspection
31. Oromocto West		*		
32. Oromocto East Industrial Park		*		*
33. Petit Rocher Industrial Park		*		*
34. Perth Andover Industrial Park	*	*		*
35. Republic Industrial Park	*	*	*	*
36. Restigouche Industrial Park	*	*	*	*
37. Rexton-Richibucto Industrial Park	*	*		*
38. Sackville Industrial Park	*	*	*	*
39. Scoudouc Industrial Park	*	*	*	*
40. Shippagan Industrial Park	*	*	*	*
41. Spruce Lake Industrial Park	*	*	*	*
42. St. Jacques Industrial Park	*	*	*	*
43. St. Leonard Industrial Park	*	*	*	*
44. St. Stephen Industrial Park	*	*		*
45. Sussex Industrial Park	*	*		*
46. Tracadie Industrial Park	*	*	*	*
47. Vanier Industrial Park	*	*		*
48. Victory Industrial Park[1]		*	*	
49. Westmorland Chemical Park		*	*	*
50. Woodstock Industrial Park (Old)	*	*		*
51. Woodstock Industrial Park (New)	*	*		*
TOTALS	36	47	35	41

[1]Questionnaire data received after statistical results were completed.

APPENDIX E

LIST OF PERSONS CONTACTED FOR INFORMATION

APPENDIX E

LIST OF PERSONS CONTACTED FOR INFORMATION

Contact	Position	Employer
Ayer, William	Manager	Land and Water Planning Section - Department of Environment
Barton, Brenda	Village Clerk	Village of Chipman
Belliveau, Peter	General Manager	Moncton Industrial Development
Benoit, Raymond	Town Clerk	Town of Tracadie
Bishop, Donald	General Manager	Chaleur Regional Development Commission Inc.
Black, Daryl	General Manager	Miramichi Region Development Commission
Boucher, Isidore	Village Mayor	Village of St-Jacques
Boudreau, Real	Town Mayor	Town of Beresford
Brideau, Gerard	Directeur General	Economic Expansion Commission of the Peninsula
Buck, Bill	INDUCON	University of Waterloo
Burrell, Brian	Environmental Officer	Department of Environment
Cameron, John D.	Manager, Atlantic Center Developments	C.N. Rail
Carnell, Wayne	Town Clerk	Town of Oromocto
Carpenter, Wayne	Industrial Commissioner	Carleton Regional Development Commission Inc.
Chippin, Joe	President	Chippin's Limited Real Estate
Cook, Greg	Executive Director, Facilities Management	Department of Supply & Services
Cormier, Roland	Assistant General Manager	Regional Development Corporation
Coy, Neil	Assistant Deputy Minister	Department of Supply & Services
Cyr, Gaitan	Town Clerk	Town of Shippigan
D'Amours, Maurice	Planning Director	Madawaska Regional Planning Commission
Danziger, Richard	Assistant City Administrator	City of Fredericton
Dee, Judy	Town Clerk	Town of Hartland
Delong, Larry	Economic Development Officer	Capital Region Development Commission Inc.

APPENDIX E

LIST OF PERSONS CONTACTED FOR INFORMATION (Cont'd)

Contact	Position	Employer
Dickenson, Ed	Town Clerk	Town of Woodstock
Dickson, Plen	Assessment Branch	N.B. Geographic Information Corporation
Dohaney, Steve	City Engineer	City of Campbellton
Dube, Felix	Mayor	Village of Saint-Quentin
Dube, Jean-Guy	Directeur General	Kent Economic Commission
Dumesnil, Martin	Planning Director	Kent County Planning Commission
Frigault, Richard	Town Clerk	Village of Bas Caraquet
Gerrard, Roger	Manager, Commercial and Industrial Development	Town of Sackville
Gibb, Kenneth	Director of Planning & Economic Development	City of Bangor
Glen, Brian	Deputy Mayor	Village of Minto
Godbout, Albert	Commissaire Industriel	Grand Falls Region Development Commission
Godin, Norval	Town Clerk	Town of Beresford
Goodwin, Art	Director, Industry Services	Commerce & Technology
Grondin, Pauline	Town Clerk	Village de St-Jacques
Guerette, Gilles	Planning Director	Restigouche District Planning Commission
Guignard, Enrie	Town Clerk	Town of Lameque
Hansen, Charles	Engineering Assistant	Fredericton District Office N.B. Power
Hartt, John	Hydrogeologist	Maritime Ground Water Inc.
Keating, Valerie	Business Development Officer	Miramichi Region Development Commission
LeBlanc, Raymond	Commissaire Industriel	South East Economic Commission Inc.
Legace, Raymond	Mayor	Town of Atholville
LeTourneau, Frank M.	Director, Industrial Parks and Properties	N.S. Department of Small Business Development
Levesque, Jean-Yves	Village Administrator	Village of St. Leonard

APPENDIX E

LIST OF PERSONS CONTACTED FOR INFORMATION (Cont'd)

Contact	Position	Employer
Long, Roland	Mayor	Village of Clair
Mahoney, Ron	City Manager	City of Campbellton
Maltais, Laurent A.	Director of Technical Services	City of Edmundston
McAllister, Don	Village Clerk	Village of Belledune
McKeon, Edward G.	Executive Director	Bangor Target Area Development Corporation
McKinney, John	Engineer	Commerce & Technology
McKinney, Patricia	Senior Development Officer	Fundy Region Development Commission Inc.
McLean, William	Town Manager	Town of Nackawic
Miller, Reginald	Public Relations	Stone Consolidated
Moore, John	Manager, Engineering Services	Commerce & Technology
Nason, Chris	Village Manager	Village of McAdam
Norman, Ross	Town Manager	Town of St. George
O'Leary, Don	Director, Economic Development	City of Saint John
Pelletier, Rino	Directeur General	Northwest Industrial Commission Inc.
Perron, Sadie	Commissaire Industriel	Restigouche Industrial Commission Inc.
Peters, Lawrence	Hydrogeologist	Department of Environment
Rath, Tom	Director	City of Dartmouth, Economic Development Department
Reid, George W.	Supervisor Projects, Technical Services Branch	N.S. Department of Industry Trade and Technology
Richard, Elie	Directeur General	Dieppe Industrial Park Ltd.
Rivard, Pauline	Co-ordinator - Federal/Provincial Agreements	Regional Development Corporation
Robertson, R. W.	Planning Director	City of Fredericton
Robichaud, Armand	Planning Director	Beaubassin District Planning Commission
Roy, George	City Engineer	City of Edmundston
Smith, David	Town Manager	Town of St. Stephen

APPENDIX E

LIST OF PERSONS CONTACTED FOR INFORMATION (Cont'd)

Contact	Position	Employer
Stevens, Ken	Planning Director	Greater Moncton Town Planning Commission
Thompson, Bill	General Manager	Fundy Region Development Commission
Vandenborre, Maurice	Director & Manager	Capital Region Development Commission; Maritime Fiberglass Fabricators
Watters, M. E.	Administrator	Town of Perth-Andover

APPENDIX F

INDUSTRIAL PARK FUNDING REQUEST

APPENDIX F

INDUSTRIAL PARK FUNDING REQUEST

NAME OF PARK _____

CONTACT PERSON - NAME: _____

TITLE: _____

ADDRESS: _____

_____

_____

_____ PH (506)- _____

To be completed by Commerce and Techno

PLEASE PROVIDE BRIEF DESCRIPTION OF USE OF FUNDS REQUESTED

_____

_____

_____

_____

_____

LOCATION OF PARK _____

DISTANCE TO - MAJOR HIGHWAY: _____Kms Route No: _____
MAJOR AIRPORT: _____Kms Name: _____
RAIL FACILITIES: _____Kms Location: _____
PORT FACILITIES: _____Kms Location: _____

PLAN FOR NEXT FIVE YEARS

Will additional land be required? (please check) yes____, no____
If yes, - why? _____

- how many acres? _____ acres, by what date? _____/_____
month year

- is land available to existing park? yes____, no____

- if yes, what is its designated zoning? _____

What additional services will be required? (please describe) _____

_____

_____

Estimate of acreage of serviced land and roads that will be required in each of the next five years?

year 1 _____acres and _____ Kms of road
year 2 _____acres and _____ Kms of road
year 3 _____acres and _____ Kms of road
year 4 _____acres and _____ Kms of road
year 5 _____acres and _____ Kms of road

What type of industry do you expect to attract to the Park? _____

_____

_____

Are the additional services expected to have any adverse impact on the existing services? On the water supply? _____

_____

On the sewage system? _____

_____

What are the estimated costs of the additional and upgraded services?

	Pre-Engineering Estimate	Engineering/Design Estimate (if Available)
Water Supply	$_____	$_____
Sewerage	$_____	$_____
Roads	$_____	$_____
Power Supply	$_____	$_____
Engineering	$_____	$_____

Proposed sale price of additional serviced land - $ _____ per acre

Describe the promotion proposed for park in terms of:

- type of promotion _____

_____

- how and by whom promoted _____

_____

- the promotion budget - year 1 $ _____ for the 5 years $_____

- the source of the promotion funds _____

_____

for use by
Commerce and Technolc

for use by
Commerce and Technc

Past Performance

Year Park Inaugurated: _____ Initial Total Acreage: _____ acres

Present - Total Acres in Park:_____ acres

- Acres Serviced with Water:_____ acres
- Gallons per Minute? _____ G/M (available)

- Acres Served with Sewer: _____ acres
- Sewage Treatment Plant? yes____, no____
  If yes, does it also serve the municipality? yes____, no____

- Kilometres of Storm Drain - underground: _____Kms
  open ditch : _____Kms

- Kilometres of Road - paved without gutter: _____Kms
  - gravel: _____Kms

- Electrical Power - three phase? yes____, no____

- Total Acres Occupied - by tenants:_____acres
  - by roads and rights of way: _____acres

- Total Acres Sold - occupied and unoccupied: _____acres

Number of Acres and Lots Sold, Price per Acre and Construction Value in Last 5 years

	No. Acres Sold	No. Lots Sold	Average $ Per Acre Sold	Total Value of Construction
This Year To-date				
During Last Fiscal Year				
Two Years Ago				
Three Years Ago				
Four Years Ago				
Five Years Ago				

What was the highest value received per acre? $_____

in what year? _____

What was total employment in park five years ago? _____persons full-time

_____persons part-time

What is total employment in park now? _____ persons full-time

_____persons part-time

Is the park governed by park - regulations? yes_____, no_____
- municipal by-laws? yes_____, no_____
- covenants? yes_____, no_____

-If yes - please attach copies

- have any exemptions been granted during the last five years?

details: _____

_____

_____

_____

_____

for use by
Commerce and Technolo

To be completed by Commerce and Technology

Industrial Park First & Five Year Budget

First Year Budget	Confirmed Funds From Municipality	Funds From Regional Dev. Commission	Banked Funds From Land Sales	Requested Funds From Province	Other Sources	Total
Maintenance & Operations	$					
Infrastructure - New						
- up-graded						
Additional Land						
Engineering Cost						
Promotion						
Other - _____						
- _____						
Total						
Five Year Estimate						
Maintenance & Operation	$					
Infrastructure - New						
- Upgraded						
Additional Land						
Engineering Costs						
Promotion						
Other - _____						
- _____						
Total						

Remarks or Explanations _____

_____

_____

_____

To be completed by Commerce and Technology

APPENDIX G

INDUSTRIAL PARK POTENTIAL

TENANT APPLICATION FORM

APPENDIX G

INDUSTRIAL PARK

POTENTIAL TENANT APPLICATION FORM

Name of Company _____

Address _____

_____

_____

Name of Contact _____ Phone: (__) - _____

Title _____

reserved for use of park management

Type of Development Proposed (check appropriate classifications)

- Manufacturing Facility _____
- Warehousing & Distribution Facility _____
- Multiple Tenancy Development _____
- Wholesale and Service Facility _____
- Retail and Service Facility _____
- Office Building _____
- Other, Specify _____

Describe type of operations to be conducted in facility? on balance of site?

_____

_____

_____

_____

Do proposed operations include storage of material or equipment out-of-doors on the site? Yes _____, No _____. If yes, describe how it will be screened: _____

_____

_____

_____

Size of site required _____ sq ft/acres (cross out inappropriate)

Proposed design of building, structural material and exterior facings.

Number of storeys _____ Overall height (max)_____ m/ft.

Steel Frame _____ Poured Concrete _____ Wood Frame _____

Vinyl Cladding and Brick Exterior _____

Pre-engineered steel cladding and Brick exterior _____

Brick exterior _____

Brick with Glass panels exterior _____

Precast concrete with Glass panels exterior _____

Other, specify _____
(be restricted by park covenants)

Size of Building - ground coverage _____sqft/m²

- total floor space _____ sqft/m²

Estimated Value of Building $_____

Landscaping - describe what proposed _____

_____

_____

- cost as percent of building value _____%

Describe surface and treatment of-

- entry road _____
- parking area _____
- storage area _____

Fencing- describe what proposed for-side lines _____

- rear line _____

- cost as percent of building value _____ %

Development Timetable		month/year		month/year
Site preparation	From	___/___	To	___/___
Building Construction	From	___/___	To	___/___
Roads Packing and Storage	From	___/___	To	___/___
Landscaping	From	___/___	To	___/___
Fencing	From	___/___	To	___/___

Method of Financing	Value	Percent
Personal Cash Equity	$ _____	_____
Corporate Cash Equity	$ _____	_____
Mortgage - proposed building	$ _____	_____
- other property	$ _____	_____
Bank Loan	$ _____	_____
Equipment Supplier	$ _____	_____
Government Contribution (grant, guarantee, loan)	$ _____	_____
Other _____	$ _____	_____
Total	$ _____	100 %

Services Required

Water - Gallons per minute - daily average _____ G/min

- Is a surge capacity required Yes _____, No _____

- Will it be required in the manufacturing or processing of products Yes _____, No _____

- Is the quality of the water a concern Yes _____, No _____

if yes, explain _____

_____

Sewage - Will you generate industrial sewage? Yes _____, No _____

if yes, - detail the components _____

_____

_____

- and daily volume _____ G/day

Electrical Power- Normal load requirements _____Kw/hr

- Peak load forecast requirements _____Kw/hr

- Entrance requirement _____Volts

Labour - Employment - full time _____

- part time _____

- Special skill requirements _____

_____

Waste - Type of waste produced _____

_____

_____

Is any hazardous waste produced? Yes _____ No _____

If yes - detail type and volume _____

_____

- detail disposal plan _____

_____

_____

Markets

The markets for the products or services are planned to be (check)

Local Community _____	Atlantic Provinces _____	USA _____
Local Region _____	Central Canada _____	Europe _____
New Brunswick _____	All of Canada _____	Elsewhere _____